

Chapter 10 | Support Plan

Introduction

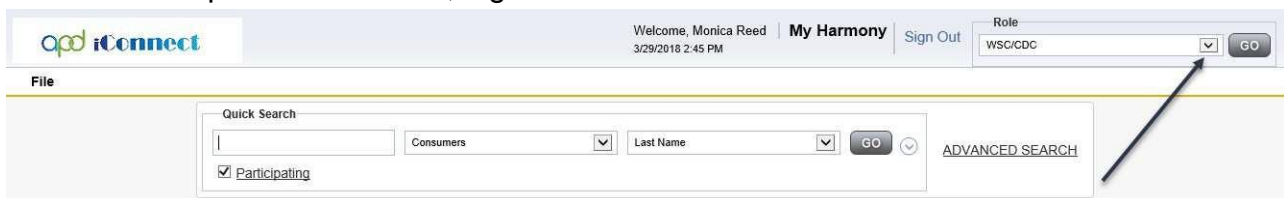
The Support Plan cannot be created until the cost plan is first initiated for an individual coming onto the waiver for the first time. The initial cost plan can be created once the QSI Assessment is completed. Based on the Consumer/Legal representative's responses to questions in the QSI Assessment, iConnect uses Copy Shared Responses functionality to import QSI responses directly into the Person-Centered Support Plan (PCSP). The WSC will review the QSI responses and address those needs during person-centered planning.

For existing consumers already in iBudget, the QSI has already been completed and will not be added to iConnect; therefore, the Copy Shared Responses function will not be available.

Once the WSC has completed the person-centered planning process, he/she will create the support plan as a Form in iConnect.

Create the Support Plan

1. Upon enrolling the Consumer into the APD waiver Program (see Chapter on Standard APD Enrollment), a Workflow Wizard triggered the following Ticklers to the Waiver Support Coordinator:
 - a. Complete Person-Centered Support Plan - *Assigned to WSC, Due Immediately*
 - b. Complete Amount Implementation Meeting - *Assigned to WSC, Due Immediately*
 - c. Upload Support Planning Collateral Documents to Note - *Assigned to WSC, Due Immediately*
 - d. Eligibility Worksheet Reminder - *Assigned to WSC, Due in 45 Days*
2. To complete the Ticklers, log into iConnect and set Role = WSC/CDC. Click **Go**.



The screenshot shows the iConnect user interface. At the top left is the 'apd iConnect' logo. The top right shows the user's name 'Welcome, Monica Reed', the date and time '3/29/2018 2:45 PM', and the text 'My Harmony'. There is a 'Sign Out' link and a 'Role' dropdown menu set to 'WSC/CDC' with a 'GO' button next to it. Below the header is a 'File' section. In the center, there is a 'Quick Search' box with a search input field, a 'Consumers' dropdown menu, and a 'Last Name' dropdown menu. There is a 'GO' button and a 'Participating' checkbox checked. To the right of the search box is an 'ADVANCED SEARCH' link. An arrow points to the 'GO' button next to the 'Role' dropdown.

3. On the **My Dashboard**, find the Consumers section and scroll down to the Ticklers Panel. Click on **Ticklers** to open the Tickler Queue:

4. Use the multi variable search to narrow down the Tickler Queue. Click **Search**:

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Initiate Cost Plan	03/29/2018	03/29/2018		New	Reed, Monica
Smith, Marianne	10043	Complete AIM	03/29/2018	04/28/2018		New	Reed, Monica
Smith, Marianne	10043	Complete Person Centered Support Plan	03/29/2018	03/29/2018		New	Reed, Monica
Smith, Marianne	10043	Upload Support Planning Docs	03/29/2018	03/29/2018		New	Reed, Monica
Smith, Marianne	10043	Complete Cost Plan	03/29/2018	05/13/2018		New	Reed, Monica
Smith, Marianne	10043	Waiver Eligibility Worksheet Reminder	03/29/2018	03/29/2019		New	Reed, Monica

5. From in the Tickler Queue, hover over the arrow next to the Tickler called Complete Person-Centered Support Plan to open it:

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Complete AIM	03/29/2018	04/28/2018		New	Reed, Monica
Smith, Marianne	10043	Complete Person Centered Support Plan	03/29/2018	03/29/2018		New	Reed, Monica
Smith, Marianne	10043	Upload Support Planning Docs	03/29/2018	03/29/2018		New	Reed, Monica
Smith, Marianne	10043	Complete Cost Plan	03/29/2018	05/13/2018		New	Reed, Monica
Smith, Marianne	10043	Waiver Eligibility Worksheet Reminder	03/29/2018	03/29/2019		New	Reed, Monica

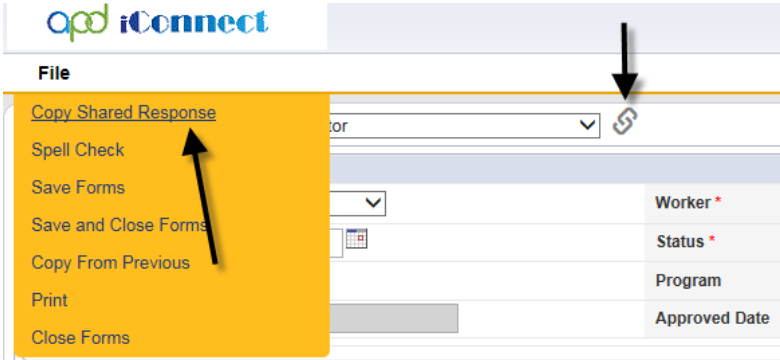
6. The Person-Centered Support Plan form displays.

7. Complete the header information. In the header of the form, set Review = Initial and Status = Open.

NOTE: There should be only one Support Plan for the year. The WSC will leave the status = Open and make changes to the same form when there is an update vs. creating a new form each time there is an update.

8. Information from other forms such as the QSI Assessment can be copied over into the support plan record automatically using the Copy Shared Response functionality in iConnect.

9. The WSC will select File > Copy Shared Responses and select the Questionnaire for Situational Information Assessment from the list of available forms.



10. A list of Assessments with Shared Responses is displayed. Select the Questionnaire Situational Information form.



11. Once selected, the system will pull the information from the QSI to fill in the full QSI section on the Person-Centered Support Plan form.

12. Please note that the Person-Centered Support Plan in iConnect should be filled out in the same way as the hard copy Person-Centered Support Plan. For questions related to what type of information should be included in the various sections of the support plan, please refer to the Person-Centered Support Plan Training modules found on the APDcares.org website.

13. Update all remaining fields.

14. When finished, click **File > Save and Close Forms**.

15. In the Workflow Wizard, hover over the arrow next to the Tickler to click **Complete**.

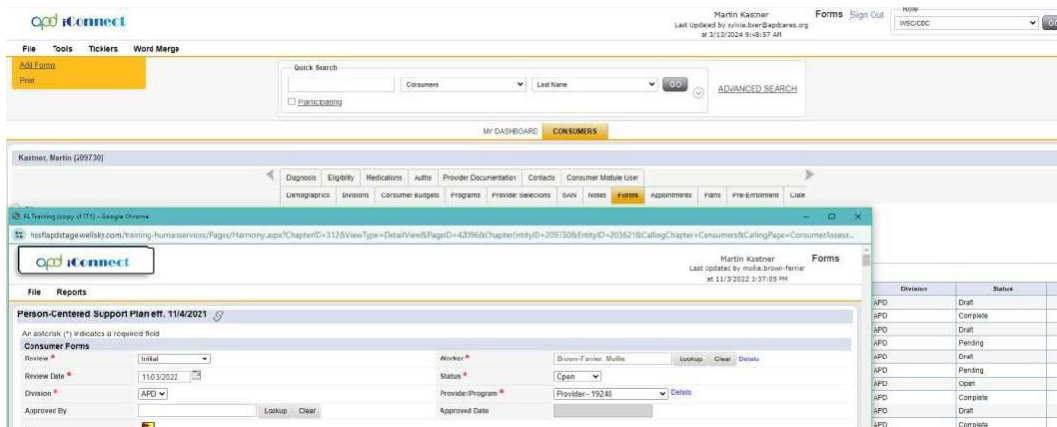
16. When finished, click File > Close Workflow Wizard.

Add Medication

A user can add a medication on the Medication Tab of the consumer record or add a medication to the Medication Tab of the consumer record from the Person-Centered Support Plan form.

Add a new Medication from a Form

- To add a new medication from within the PCSP, the WSC will either add a new PCSP or open the existing PCSP.



2. Medications are captured in the Medications tab of iConnect and can be added to the support plan without the WSC re-typing the information.
3. WSCs can also add new medications from the Person-Centered Support Plan form and the medication will be added to the support plan and the Medications tab of iConnect.
4. To add an existing medication from the Medication tab to the Person-Centered Support Plan, select **Search** and a list of medications from the medications tab of the consumer record is displayed. Select a medication and the page refreshes and the support plan is populated with the medication information.



5. To add a new medication from the Person-Centered Support Plan that will be added to the Support plan form and to the Medication tab, use the Medication Control on the form.
6. In the My Health section of the form, select **Add New Medication**.

My Health

Important Information About My Health

Hospitalizations in the past year?

My Medication Information (current as of date of support plan meeting)

Medications

0 record(s) returned

- The Medication search window opens. Begin typing the name of the medication. Matching values are displayed. Select the medication and complete the remaining fields.

Add New Medication

Medication *

Order Date (start date) *

D/C Date (end date)

Status *

Dose *

Dose Units *

Frequency *

Route *

Where Obtained

Mail Order

Packaging

Type of Assistance *

Medication Assistance *

Prescribed By *

Instructions per Label

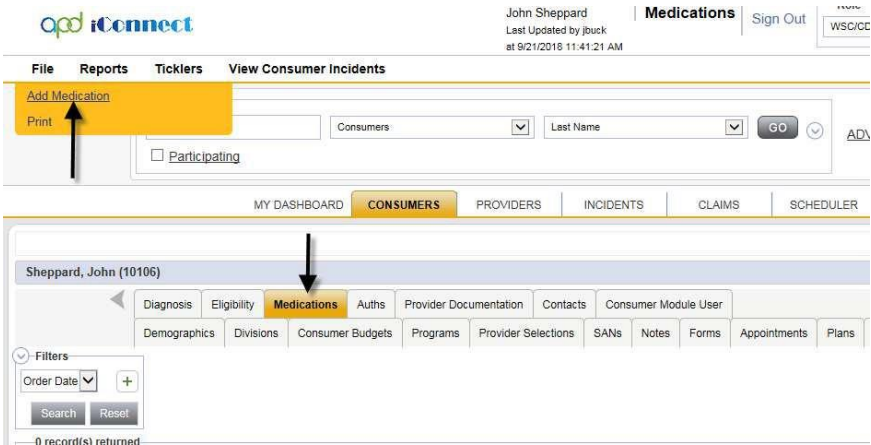
Reason for Medication

Side Effects/Problems Experienced

- Once complete, select **Save and Close**. The page will refresh with the medication information section completed. Save and Close the Person-Centered Support Plan form.

Add Medication to the Medication Tab

- Navigate to the **Medication** tab on the Consumer record.
- From the **File** menu >Select **Add Medication**.



3. Complete the Medication details page

File

An asterisk (*) indicates a required field

Medication *	<input type="text"/>	...	Clear
NDC Code	<input type="text"/>		
Dose *	<input type="text"/>		
Dose Units *	<input type="text"/>		
Strength *	<input type="text"/>		
Frequency *	<input type="text"/>		
Route *	<input type="text"/>		
Prescribed By *	<input type="text"/>		
Order Date (start date) *	04/08/2024		
D/C Date (end date)	MM/DD/YYYY		
Status *	<input type="text"/>		
PRN?	<input type="checkbox"/>		
Instructions per Label	<input type="text"/>		
Reason for Medication	<input type="text"/>		
Side Effects/Problems Experienced	<input type="text"/>		
Where Obtained	<input type="text"/>		
Mail Order	<input type="text"/>		
Packaging	<input type="text"/>		
Type of Assistance *	<input type="text"/>		
Medication Assistance *	<input type="text"/>		
Send To Emar	<input type="text"/>		
Dispense Time 1	<input type="text"/>	<input type="text"/>	<input type="text"/>
Dispense Time 2	<input type="text"/>	<input type="text"/>	<input type="text"/>
Dispense Time 3	<input type="text"/>	<input type="text"/>	<input type="text"/>
Dispense Time 4	<input type="text"/>	<input type="text"/>	<input type="text"/>
Dispense Time 5	<input type="text"/>	<input type="text"/>	<input type="text"/>

- When complete, select **File > Save and Close Medication**. Repeat this process for each Medication.

Schedule & Complete the AIM

1. Back in the Tickler Queue, click to open the Tickler called Complete AIM:

4 Ticklers record(s) returned - now viewing 1 through 4

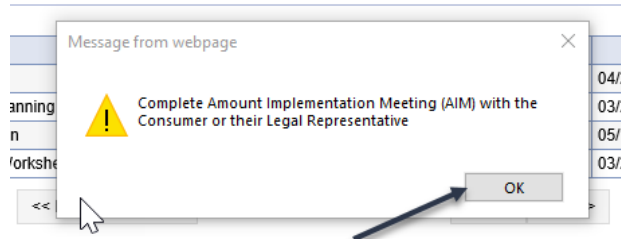
Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Complete AIM	03/29/2018	04/28/2018		New	Reed, Monica
Smith, Marianne	10043	Upload Support Planning Docs	03/29/2018	03/29/2018		New	Reed, Monica
Smith, Marianne	10043	Complete Cost Plan	03/29/2018	05/13/2018		New	Reed, Monica
Smith, Marianne	10043	Waiver Eligibility Worksheet Reminder	03/29/2018	03/29/2019		New	Reed, Monica

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

Smith, Marianne	10043	Complete Cost Plan	03/29/2018	05/13/2018		New	Reed, Monica
Smith, Marianne	10043	Waiver Eligibility Worksheet Reminder	03/29/2018	03/29/2019		New	Reed, Monica

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

2. A Message Tickler opens - Complete Amount Implementation Meeting (AIM) with the Consumer or their Legal Representative. Click **OK**.



3. Hover over the arrow next to the Tickler to click **Complete**, then schedule and complete the Amount Implementation Meeting (AIM) following the steps outlined below:
4. Contact the Consumer to schedule the AIM and to identify AIM participants. Document each contact in a Consumer Note record.
5. To do so, navigate to the consumer's record and click on the **Notes** tab > **File > Add Note**:

MY HARMONY CONSUMERS PROVIDERS INCIDENTS CL

Smith, Marianne (10043)

Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Module Use

Demographics Divisions Programs Provider Selections **Notes** Forms Appointments Plans

Filters: Note Date [v] + Search Reset

13 Notes record(s) returned - now viewing 1 through 13

Note Date	Note By	Note Type	Note Sub-Type
03/29/2018	Regional, Jim	Waiver Enrollment	Waiver Enrollment Request
03/27/2018	WLCordinator, Sue	Waiver Enrollment	Offer Response - Accepted
03/27/2018	WLCordinator, Sue	WSC Selection	Initial Assignment
03/27/2018	State Worker	Waiver Enrollment	Offer Sent

6. In the new Consumer Note record, update the following fields:
 - a. Division = APD
 - b. Note Type = Support Plan
 - c. Note Subtype = Pre-Support Planning Activities

d. Status = Complete

7. When finished, click **File > Save and Close Note.**

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 03/29/2018

Program/Provider

Note Type * Support Plan

Note Sub-Type Pre-Support Planning Activities

Description

Note 3/29/18 - Attempted to contact the Consumer. Left voicemail

Status * Complete

Date Completed 03/29/2018

8. Upon identifying Consumer Participants, add them to the Consumers record by clicking on **Contacts > Add New Contacts Search:**

File Tools Ticklers View Consumer Incident

Add New Contacts Search Quick Search

Add New Consumer Participant Search Consumers Last Name

Print Participating

MY HARMONY **CONSUMERS** PROVIDERS INCIDENTS CI

Smith, Marianne (10043)

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

Demographics Divisions Programs Provider Selections Notes Forms Appointments Plans

Filters

Active Equal To Yes AND

Relation ID +

Search Reset

9. Use the multi variable search to search for the Participant.

10. If you find a matching record in the search results, click on the match.

11. If no matching record is found, click **Add New:**

File

Filters

Last Name Equal To slater AND

First Name Begins With eugene OR

Last Name +

Search Reset Add New

0 record(s) returned

12. On the Contact Detail page, update all relevant fields including Primary Relationship and Relationships = Care Planning Participant (if they will be invited to participate in the AIM)

File

Contact Detail

Primary Relationship * Attorney

Relationship(s) Advocate
Aunt
Boyfriend
Brother
Care Planning Participant
Care Provider
Case Manager

Active Military Status

Active

Comments

Demographic Information

Salutation Mr.

Last Name * Slater

First Name * Eugene

Middle Name

Suffix Jr.

Title Attorney at Law

13. When finished, click **File > Save and Close Contacts**

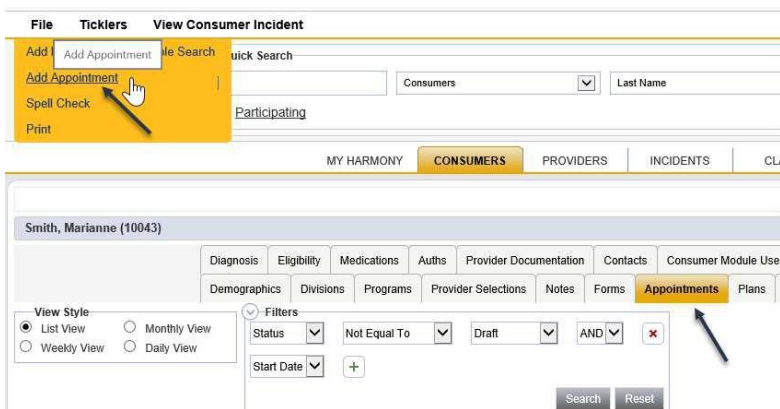
14. Upon identifying the consumer's AIM Participants, reach out to invite them to participate in the AIM. Document each participant outreach attempt in a Consumer Note. To do so, navigate to the consumer's record and click on the **Notes** tab > **File > Add Note**.

15. In the new Note record, update the following fields:

- a. Division = APD
- b. Note Type = Support Plan
- c. Note Subtype = Pre-Support Planning Activities
- d. Status = Complete

16. When finished, click **File > Save and Close Note.**

17. Upon reaching the Consumer via telephone, schedule the appointment. Optionally, add an Appointment in iConnect on the Consumers record. To do so, navigate to the consumer's record and click **Appointments > File > Add Appointment.**



18. In the new Appointment record, update the following fields:

- a. Division = APD
- b. Start Date
- c. Start Time
- d. End Date
- e. End Time
- f. Appointment Type = AIM/Support Plan Meeting
- g. Status = Scheduled

19. When finished, click File > Save Appointment

File

Appointment Detail

Division	APD
Program	
Start Date *	03/29/2018
Start Time	03 41 PM
End Date	03/29/2018
End Time	04 11 PM
Travel Time	
Preparation Time	
Type	AIM/Support Plan Meeting
Sub Type	
Subject	AIM Support Plan Meeting
Appointment Summary	3/29/18 - AIM Meeting Scheduled 408 characters remaining
Additional Information (Private)	 500 characters remaining
Reason	
Location	
Status *	Scheduled
High Priority	<input type="checkbox"/>

20. Upon doing so, the Appointment record will refresh and display the **Add Attendee** tab

File

Appointment

Attendee List

Add Attendee

Appointment Detail

Division	APD
Program	
Start Date *	03/29/2018
Start Time	03 41 PM
End Date	03/29/2018
End Time	04 11 PM
Travel Time	
Preparation Time	
Type	AIM/Support Plan Meeting

21. To add Participants to the Appointment, click on the **Add Attendee** tab and set Filter = Case Relations.

22. Click on the appropriate relation and click Add to add the Participant to the Appointment. Note that you can use the CTRL key to select multiple workers before clicking **Add**

23. When finished, click File > Save and Close Add Attendee

24. Prior to conducting the Initial Support Plan/AIM meeting, the WSC will prepare the documentation. WSCs will take a meeting signature sheet to the Initial Support Plan/AIM meeting with the Consumer. A blank Person-Centered Support Plan output report is printed. It will be filled out when face to face with the consumer and then keyed into the Person-Centered Support Plan form in iConnect.

25. The WSC will add Planned Services discussed with the Consumer in iConnect. Planned services can be added before and/or after the Initial Support Plan/AIM meeting with the consumer. If they are entered before, the WSC can benefit from a partially completed AIM Worksheet to review with the Consumer.

26. There will be a second meeting with the Consumer. The planned services have been entered and the Person-Centered Support Plan form has been completed in iConnect. The completed Person-Centered Support Plan report output and AIM Worksheet are printed from APD iConnect. Both are signed by the consumer and added as attachments to Notes in iConnect.

27. Before printing the AIM, navigate to the **Plans** tab and open the existing Plan record:



28. Update the following fields:

- a. Worker = WSC
- b. Status = Draft

29. When finished, click **File > Save Plan**.

30. Print the AIM Worksheet. On the Plan Information page, click Reports. From here, select the AIM Worksheet.

31. This will launch a new window. Choose to save as an excel document, so it can be edited.

32. Excel will launch and the AIM worksheet will show as 3 sheets. Each sheet represents a page of the AIM Worksheet. All 3 sheets need to be printed to take to the consumer and review.

Amount Implementation Meeting Worksheet



Region: SOUTHERN Date Submitted: _____

iBudget Cost Plan Begin/End Dates

From: 07/01/2018 To: 06/30/2019

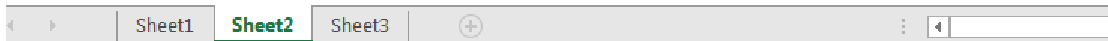
Individual's Name: Sheppard, John PIN: 10106

Legal Rep. Name: Sheppard, Violet iBudget Amount: 170000

Requested Annualized Services

SERVICE	BEGIN DATE	END DATE	RATE	UNITS	AMOUNTS	ANNUALIZED	ANNUALIZED
(4260) Speech Therapy	07/01/2018	06/30/2019	16.02	1460.00	23389.2		\$
(4270) Support Coordination	07/01/2018	06/30/2019	148.69	12.00	1784.28		\$
(4270) Support Coordination	07/01/2018	11/01/2018	148.69	5.00	743.45		\$
(4270) Support Coordination	07/01/2018	06/30/2019	148.69	12.00	1784.28		\$
(4175) Residential	07/01/2018	06/30/2019	136.50	365.00	49822.5		\$
(4142) Personal Supports	08/29/2018	06/30/2019	4.00	2448.00	9792		\$
(4300) Transportation - Mile	07/01/2018	06/30/2019	30.00	2600.00	78000		\$
(4083) Life Skills	08/29/2018	06/30/2019	9.05	22.00	199.1		\$
TOTAL:					165514.81		

Region Office Notes
(For Region Office Use Only)



34. Print the Person-Centered Support Plan. Navigate to the Forms tab. Open the Person-Centered Support Plan Form from the grid view.

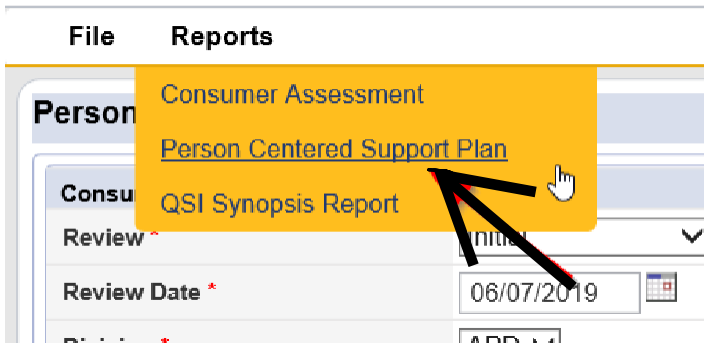
Demographics Divisions Consumer Budgets Programs Provider Selections SAN Notes **Forms** Appointments Plans

Filters
Form [v] +
Search Reset

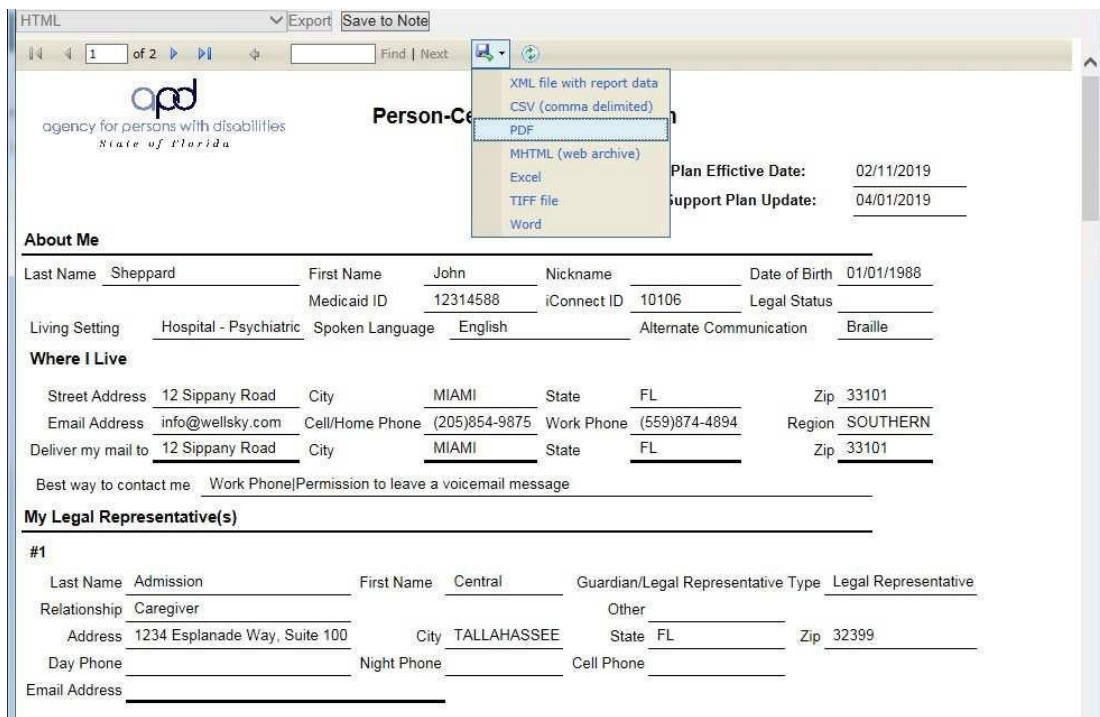
4 Forms record(s) returned - now viewing 1 through 4

Form	Review	Review Date	Worker
Person-Centered Support Plan	Initial	06/07/2019	Mott, Shelia
Questionnaire Situational Information	Initial	06/07/2019	Mott, Shelia
HCBS Waiver Eligibility Worksheet	Annual	05/10/2019	Mott, Shelia

35. From within the PCSP form, select **Reports > Person Centered Support Plan**.



36. This will launch a new window. The WSC can either save directly to note or save as pdf to their computer. Either option will give the WSC a printable pdf version of the PCSP to be used when gathering consumer / legal representative signature.



37. If the Save to Note option is chosen, a Note window will launch with the pdf output listed as an attachment.

Notes Details

Division * APD ▾

Note By * [Add](#) [Update](#)

Note Date * 06/07/2019

Program/Provider * WSC Agency1 ▾ [Details](#)

Note Type * Support Plan ▾*

Note Sub-Type Signatures ▾

Description Person Centered Support Plan ▾

Note

New Text
Printable output to share with consumer / legal representative and to obtain signatures.

[Append Text to Note](#)

Status * Pending ▾

Attachments
[Add Attachment](#)

Document	Description
rp_custom_PersonCenteredSupportPlanReport.pdf	

38. Attach a copy of the signed AIM Worksheet and Person-Centered Support Plan to a Note in iConnect. On the consumer's record, click on **Notes > File > Add Note**:

File Tools Reports Ticklers View Consumer Incident

[Add Notes](#) [Consumer People Search](#) [Tick Search](#)

[Add Notes](#) Consumers ▾ Last Name ▾

[Print](#)

MY DASHBOARD **CONSUMERS** PROVIDERS INCIDENTS CLAIMS SCHEDULER

Smith, Marianne (10043)

Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Module User

Demographics Divisions Consumer Budgets Programs Provider Selections **Notes** Forms Appointments

Filters
Note Date ▾ +

39. In the new Note record, update the following fields:

- Note Type = Support Plan

- b. Note Subtype = Signatures
- c. Status = Complete
- d. Attach the signed Person-Centered Output Report to the Note record by clicking **Add Attachment > Browse >** select the appropriate file from your computer > **Upload**
- e. Note Recipients = the WSC add all relevant providers as recipients on that note. If an update to the PCSP has information necessary for any or all providers, the WSC will follow the same process to notify the pertinent providers.

40. When finished, click File > Save and Close Note

Notes Details

Division *	APD
Note By *	Tierney, Jacqueline
Note Date *	03/30/2018
Program/Provider	APD Waiver Details
Note Type *	Support Plan
Note Sub-Type	Signatures
Description	
Note	3/30 - Signed "Person Centered Support Plan" Output report attached to this Note record
Status *	Complete
Date Completed	03/30/2018

41. Navigate back to the Tickler Queue to complete the remaining Ticklers:

Filters

Status	Equal To	New	AND	✕
Last Name	Equal To	smith	AND	✕
iConnect ID	+			

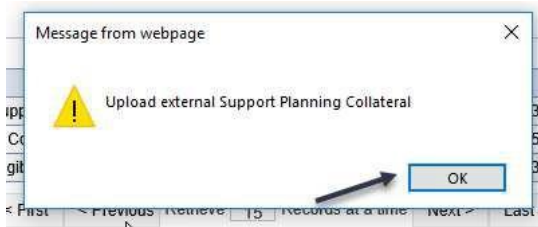
Apply Alert Days Before Due

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Upload Support Planning Docs	03/29/2018	03/29/2018		New	Reed, Monica
Smith, Marianne	10043	Complete Cost Plan	03/29/2018	05/13/2018		New	Reed, Monica
Smith, Marianne	10043	Waiver Eligibility Worksheet Reminder	03/29/2018	03/29/2019		New	Reed, Monica

42. Click on the Tickler called Upload Support Planning Docs to open it.

43. A Message Tickler will open – Upload external Support Planning Collateral. Click OK.



44. If the Consumer shared any collateral documentation with the WSC during the AIM, upload it to a Consumer Note by navigating to the consumer's record and clicking **Notes > File > Add Note**.

45. In the new Consumer Note record, update the following fields:

- a. Division = APD
- b. Note Type = Support Plan
- c. Note Subtype = Documentation
- d. Status = Complete

46. When finished, click **File > Save and Close Notes**

File Tools

Notes Details

Division *	APD
Note By *	Reed, Monica
Note Date *	03/30/2018
Program/Provider	
Note Type *	Support Plan
Note Sub-Type	Documentation
Description	
Note	3/30 - Attached Support Plan Collateral Documentation below
Status *	Complete
Date Completed	03/30/2018

A screenshot of a software interface showing a 'Notes Details' form. The form has several fields with dropdown menus. The 'Note Type' dropdown is set to 'Support Plan' and the 'Note Sub-Type' dropdown is set to 'Documentation'. A black arrow points to the 'Documentation' option in the 'Note Sub-Type' dropdown. The 'Status' dropdown is set to 'Complete'. The 'Date Completed' field is set to '03/30/2018'. The 'Note' field contains the text '3/30 - Attached Support Plan Collateral Documentation below'. The form is titled 'Notes Details' and has a 'File' and 'Tools' menu bar at the top.

47. When finished completing the Tickler, hover over the arrow next to it and click Complete:

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Upload Support Planning Docs	03/29/2018	03/29/2018		New	
Smith, Marianne	10043	Complete Cost Plan	03/29/2018	05/13/2018		New	
Smith, Marianne	10043	Waiver Eligibility Worksheet Reminder	03/29/2018	03/29/2019		New	

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

48. Back in the Tickler Queue, click on the next Tickler called Complete Cost Plan to open it.

49. The consumer's Plans List View grid will open. Click on the appropriate Cost Plan record to open it:

File

Workflow Wizard

Complete Cost Plan

Filters

Division

Search Reset

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

Division	Program	Worker	Cost Plan Creation Date	Status	Cost Plan Begin Date	Cost Plan End Date
APD	APD Waiver	Reed, Monica	03/27/2018	Pending	03/27/2018	

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

50. Review the planned services, and make updates as needed. Proceed to [Chapter 11|Edit Planned Services.](#)

51. Add new planned services as needed. Proceed to [Chapter 11|Add Planned Services.](#)

52. When complete, mark the tickler as complete. Back in the Tickler Queue, hover over the arrow next to the Tickler to click **Complete**:

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Complete Cost Plan	03/29/2018	05/13/2018		New	Reed, Monica
Smith, Marianne	10043	Waiver Eligibility Worksheet Reminder	03/29/2018	03/29/2019		New	

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

Support Plan Update

1. Throughout the support plan year, the WSC may need to update the existing support plan based on changes in the consumer's needs or desires. The existing

Support plan form will be amended/updated. A new Support Plan form will not be created.

2. Also, the WSC may need to update the consumer's plan as a result of a Provider expansion. The Region Waiver Workstream Lead will monitor their Notes queue on My Dashboard for the Service Plan Impact Notification note. This note instructs Region Waiver Workstream Lead to run the authorization report to identify the impacted consumers.

a. Navigate to the Reports chapter and select the Active Authorizations by Provider report.

- b. In the report parameters, enter the following:
- Fund Code = APD
 - Fiscal Year = current and possibly next Fiscal year
 - Program = Select the provider by agency name

c. Select Run Report.

The screenshot shows a web interface with a navigation bar at the top containing 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', 'SCHEDULER', 'UTILITIES', and 'REPORTS'. Below the navigation bar is a 'Filter Report By' section with several dropdown menus: 'Type', 'Category', 'FundCode' (set to 'APD'), 'FiscalYear' (set to '2020'), and 'Program' (set to 'A Test Provider'). A 'Retrieve' button is next to the 'Type' and 'Category' dropdowns. Below these fields is a 'Run Report' button. Underneath the filter section is a table with two columns: 'Report Name' and 'Description'. The table lists several report options, with 'Active Authorizations By Provider' selected (indicated by a radio button).

Report Name	Description
<input type="radio"/> 835 Status Report	This report is intended to show the BPR and Claim Payment Amounts for the most recent 835.
<input type="radio"/> Active Authorizations	Summary list of all Active Authorizations for the selected Fund Code and Fiscal Year. One row will be displayed for each authorized service.
<input type="radio"/> Active Authorizations By ISO	This report shows a summary of the amount authorized by index code and by subobject code.
<input checked="" type="radio"/> Active Authorizations By Provider	This report shows details of authorizations grouped by Provider.
<input type="radio"/> Active Authorizations By Provider and Service Code	In the Service Code parameter, type in the service code exactly as is (ex. G9005:U3). This report shows active authorizations for the selected provider and service code.

d. The report opens in a new window and can be downloaded as an Excel spreadsheet if needed.

The screenshot shows a web browser window displaying the report output. The URL is <https://tssbhl.mediware.com/FLAPInterfaceTest/Pages/Report.aspx?ReportID=11181&SCFid=FundCode%2CFiscalYear%2CProgram&SCOp=Equal%20To%2CEqual%20To%2C>. The page title is 'Active Authorizations By Provider'. Below the title, there is a 'Generated By: Jennifer Buck on 03/23/2020 04:37 PM' and 'Fiscal Year: 2020'. The report parameters are 'Fund Code: APD' and 'Program: A Test Provider'. A table with the following columns is displayed: Consumer, Case No, Auth, Status, Start/End Dates, Region, Match Source, Service Code, Units, Unit Cost, and Auth Amt. The table contains one row of data for a consumer with Case No 12345, Status 'Fully Approved', and a total authorized amount of \$743.45. An export menu is open over the table, showing options for XML file with report data, CSV (comma delimited), PDF, MHTML (web archive), Excel, TIFF File, and Word.

Consumer	Case No	Auth	Status	Start/End Dates	Region	Match Source	Service Code	Units	Unit Cost	Auth Amt
Consumer Name	12345	Fully Approved		2/6/2020 - 6/30/2020	Central		G9012:UC	5	\$148.89	\$743.45
Grand Total Authorized Amount:										\$743.45

e. The Region Waiver Workstream Lead will contact each impacted consumer's WSC to inform them of the approved provider expansion request.

f. The WSC will update each impacted consumer's plan, planned services and authorizations as a result of the approved provider expansion request.

3. The steps to update the consumer plan are below. The steps to update planned services is in [Chapter 11|Cost Plan](#).

4. The WSC will locate the Support Plan form on the Consumer record > **Forms** tab and select to edit.

5. The form must be in Draft, Pending or Open status to be editable. Forms in Complete status are read only can cannot be edited.

The screenshot shows the 'CONSUMERS' tab in the iConnect system. The consumer record for 'Sheppard, Alice (10053)' is displayed. The 'Forms' tab is selected, and a table of forms is shown. A black arrow points to the 'Forms' tab, and another black arrow points to the first row of the table.

Form	Review	Review Date	Worker
Person Centered Support Plan	Annual	07/05/2019	Buck, Jennifer
Person Centered Support Plan	Initial	07/05/2018	Buck, Jennifer

6. Update the fields as needed. Click **File > Save and Close Forms**.

7. Every time a form is saved, a snapshot of the form is saved in the History records. Select **File > History** to review previous versions of the support plan.

The screenshot shows the 'PERSON CENTERED SUPPORT PLAN' form in the iConnect system. The 'File' menu is open, and the 'History' option is highlighted with a black arrow. The form fields are visible, including 'Worker' (Buck, Jennifer), 'Status' (Draft), and 'Support Plan Effective Date' (05/01/2018).

8. If more than one history record exists, click the Next or Last buttons at the bottom of the page to view each one.

File

History Viewer

This record was updated by j buck at 7/5/2018 2:39:41 PM ←

Person Centered Support Plan

Consumer Forms

Review *	Initial	Worker *	Buck, Jennifer
Review Date *	07/05/2018	Status *	Draft
Division *	APD	Provider/Program	
Approved By		Approved Date	
Note			

PERSON CENTERED SUPPORT PLAN

Support Plan Effective Date* 05/01/2018

My Waiver Support Coordinator

WSC Name* Buck, Jennifer

WSC Agency Name:

WSC Phone Number:

WSC Email:

<< First < Previous Record 1 of 3 Next > Last >>

Annual Support Plan Review

1. When the Program record was saved with Program = APD waiver and Status = Enrolled, a Workflow Wizard was triggered prompting the Waiver Support Coordinator (Primary Worker) to complete the Annual Support Plan Review due before the expiration of the current Person-Centered Support Plan. The WSC will receive a tickler due 365 days from the APD waiver Program Begin Date, however WSC's usually begin the process 90 days in advance.

apd iConnect John Sheppard | Program
Last Updated by j buck at 5/23/2018 3:37:16 PM

File Tools Word Merge

Program

Program Workers

Notes

Events

Track Disposition

Division * APD

Worker Buck, Jennifer Clear Details

Referral Date

Create Date * 05/23/2018

Program * APD Waiver Details

Disposition * Enrolled

Disposition Date * 05/23/2018

Enrollment Type Pre-Enrollment to Wavier

Program Begin Date * 05/23/2018

Expected Deactivated Date

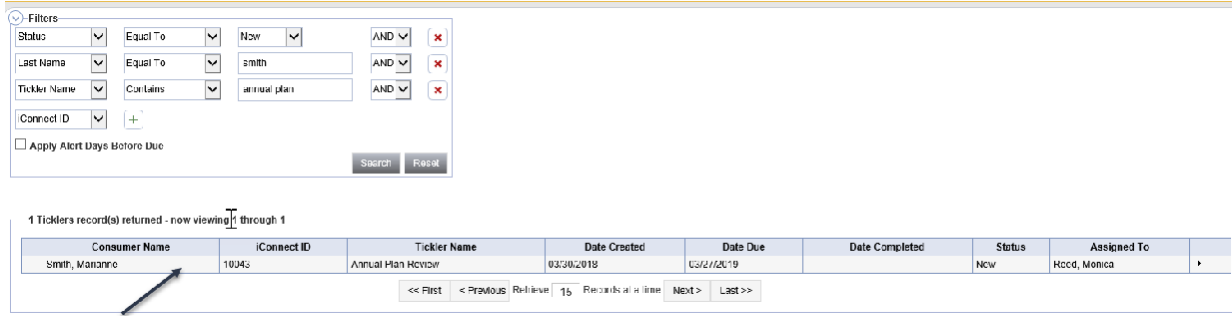
Comments

2. When the tickler above is completed, a second Workflow Wizard will be triggered prompting the Waiver Support Coordinator to complete the Annual Support Plan Review again, 365 days after the first tickler is completed.

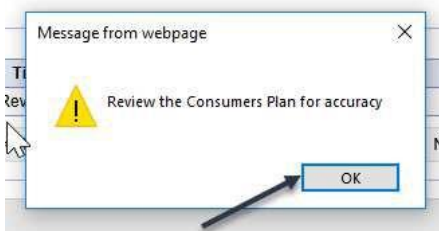
3. Assume one year has passed since the Consumer was enrolled on the waiver, access the Annual Plan Review Tickler by navigating to the **My Dashboard**, finding the consumer's section and scrolling down to the Ticklers Panel. Click on the **Ticklers** link:



4. In the Tickler Queue, use the multi variable search to narrow the results down to the Annual Plan Review Tickler. Click on the Tickler to open it:



5. A Message Tickler will open – Review the Consumers Plan for accuracy. Click **OK**.



6. Navigate to the consumer's record and click on the **Plans** tab. Open the relevant Cost Plan and review it for accuracy.

7. Navigate to the consumer's record and click on the Forms tab. Click the **Person-Centered Support Plan** form with Status = Open.

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

Sheppard, Alice (10053)

Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Module **Forms** Appointments Plans

Demographics Divisions Consumer Budgets Programs Provider Selections SANS Notes

Filters
Form +
Search Reset

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

Form	Review	Review Date	Worker
Person Centered Support Plan	Annual	07/05/2019	Buck, Jennifer
Person Centered Support Plan	Initial	07/05/2018	Buck, Jennifer

8. WSCs should never utilize the same person-centered support plan from year to year. However, some information may not change. While goals, needs, and other important factors must be reviewed and updated each year, WSCs may use the **Duplicate Assessment** feature to copy information such as the social history. However, the WSC must update all section of the support plan with new information and change the effective date of the plan.

9. 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.

god connect Alice Sheppard Last Updated by buck at 7/5/2018 2:35:41 PM Forms

File Reports

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

Initial
07/05/2018
APD

Worker * Buck, Jennifer
Status * Draft
Provider/Program
Approved Date

PERSON CENTERED SUPPORT PLAN

Support Plan Effective Date* 05/01/2018

My Walker Support Coordinator

WSC Name* Buck, Jennifer
WSC Agency Name:
WSC Phone Number:

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

11. Update the support plan effective date.

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

13. When finished, change the **Status** = Open. Click **File > Save and Close Forms**.

14. The Forms list view displays. Select the existing (previous year's) Person-Centered Support Plan form.

15. In the header change the **Status** from Open to Complete.

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

17. Navigate back to the Tickler Queue and hover over the arrow next to the Tickler to click **Complete**:

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Annual Plan Review	03/30/2018	03/27/2019		New	Reed, Monica

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

