

## Chapter 11 | Cost Plan

### Introduction

In iConnect, the 'Cost Plan' consists of one or more 'planned services' the Consumer needs to meet his/her needs. These planned services must be validated against the algorithm amount and other business rules through the plan validation function in iConnect. This same process is followed for individuals who transition to the waiver via crisis, or any other approved waiver enrollment process. Authorizations cannot be created until the plan is validated successfully. Please review the definitions below:

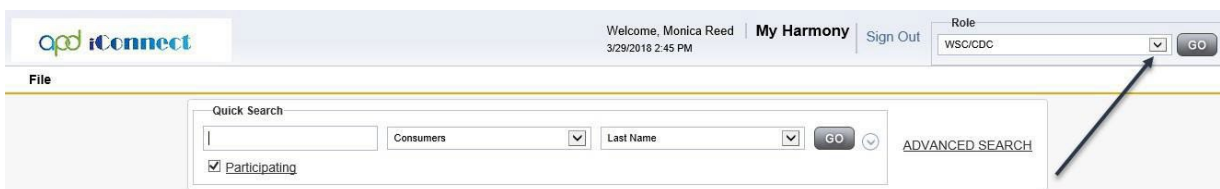
**Planned Services:** Planned Services are services, such as respite, support coordination and transportation, that the WSC has added to the consumer record in iConnect. The services are decided based on the QSI results and needs, and information gathered during the AIM or person-centered planning process. A set of Planned Services are contained within a Cost Plan.

**Plan Validation:** After Planned Services have been added to the Cost Plan, the Cost Plan is validated against business rules, requirements and regulations. iConnect includes a validation tool to perform this function. If validation passes, the WSC can then authorize the Planned Services. If validation does not pass, the WSC and/or regional or state staff make corrections or complete reviews until the Cost Plan has been successfully validated.

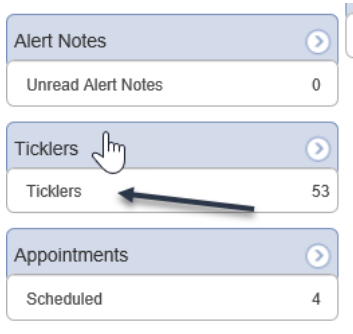
**Authorizations:** Once the Cost Plan has been successfully validated, each Planned Service, both waiver and non-waiver, must be authorized, using the iConnect authorization function. If a provider does not have access to iConnect, the WSC sends the authorizations to the provider. When a provider has access, they can view the authorizations in the application.

### Create a New Cost Plan

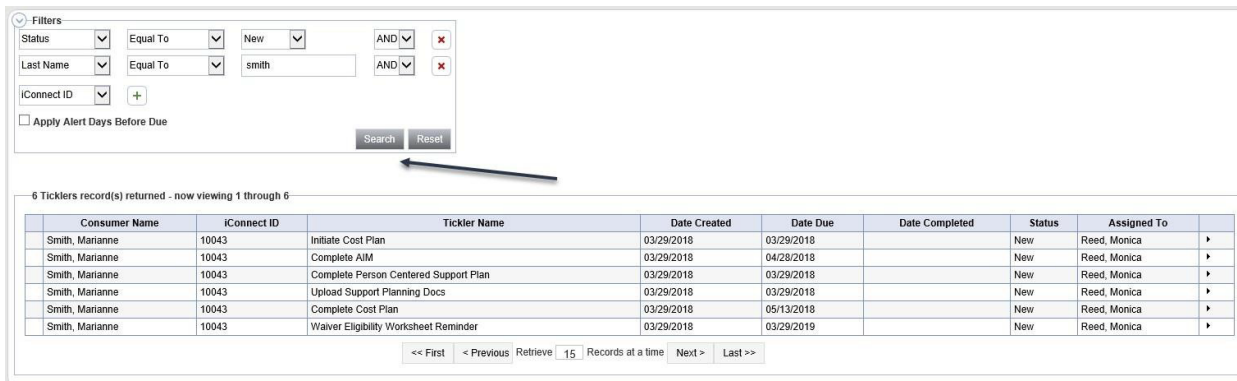
1. Upon enrolling the Consumer into the APD waiver Program (see Chapter on Standard APD Enrollment), a Workflow Wizard triggered the following Ticklers to the Waiver Support Coordinator:
  - a. Initiate Cost Plan, due immediately
  - b. Complete Cost Plan - *Assigned to WSC*, Due in 45 Days
2. To complete the Ticklers, log into iConnect and set Role = WSC/CDC. Click Go.



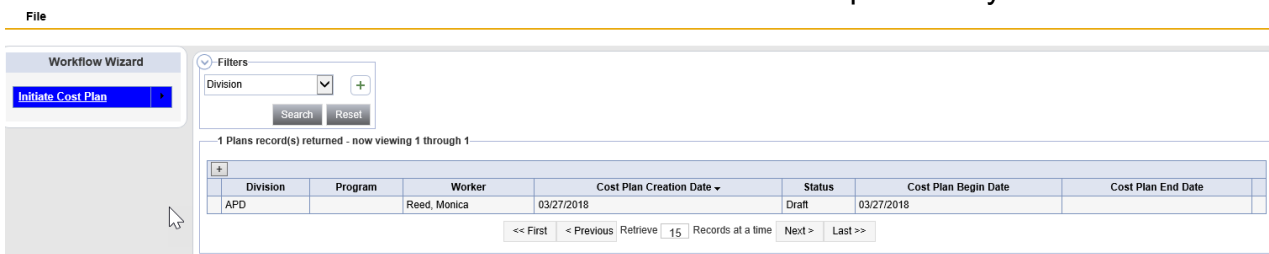
- On the **My Dashboard**, find the Consumers section and scroll down to the Ticklers Panel. Click on **Ticklers** to open the Tickler Queue:



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

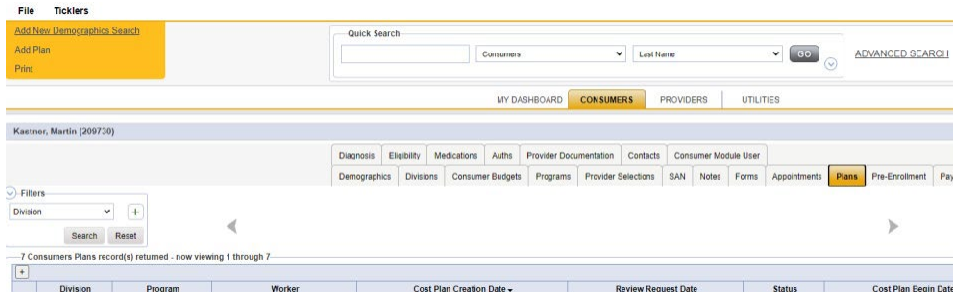


- Click to open the first Tickler called **Initiate Cost Plan**
  - The consumer’s Cost Plan List View Grid will open. Verify a Plan Record

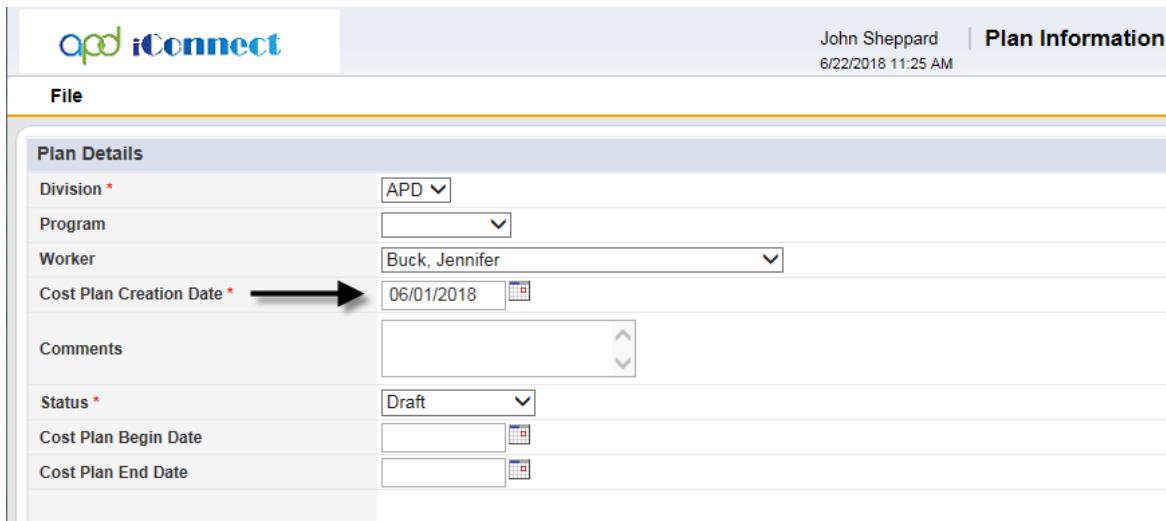


does not already exist. If not, once must be created.

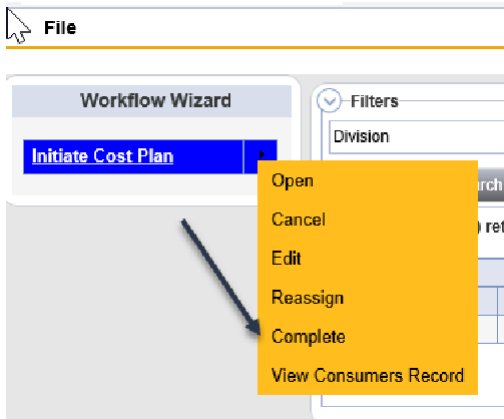
- Plan records are required before planned services and authorizations can be created.
- From the tickler flyout menu, select **View Consumer Record** to open the consumer’s record. Click > the **Plans** tab.
- Click **File > Add Plan**.



9. The Plan Information page displays. Update the following fields:
  - a. Cost Plan Creation Date = today
  - b. Division, Worker and Status have default values that do not need to be changed.
  - c. Enter the Cost Plan Begin and End Dates.
  - d. The remaining non-required fields can be left blank.



10. Click **File > Save Plan**. Additional subpages are visible to the left.
11. Proceed to [Adding Planned Services](#) if needed.
12. Hover over the arrow next to the Initiate Cost Plan Tickler to click **Complete**. Then click **File > Close Workflow Wizard**.

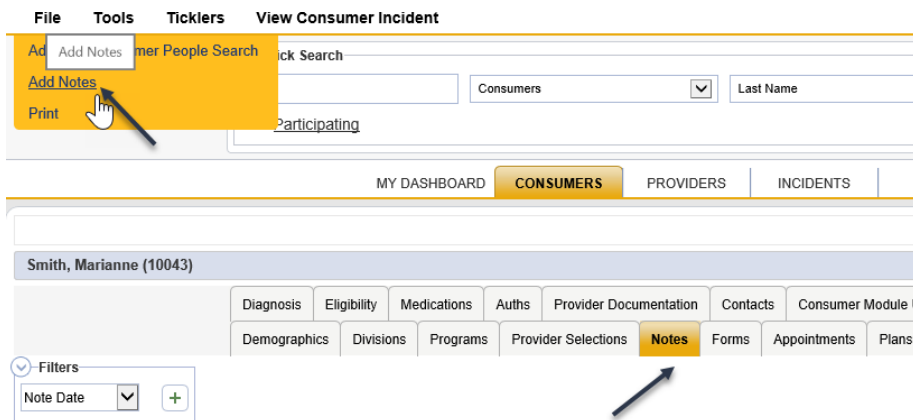


### Identify & Select Service Providers

1. The Waiver Support Coordinator or the Pre-Enrollment Support Coordinator will work with the Consumer to identify any available natural and community support for each required Service.
2. To assist the Consumer with selecting Providers, set up Provider interviews and site visits. Then complete the following process for each Provider.
3. Document the Provider interviews and site visits in Consumer Note records. To begin, log into iConnect and set Role = WSC/CDC. Click **Go**.



4. Navigate to the consumer's record and click **Notes > File > Add Note:**



5. In the new Note record, update the following fields:
  - a. Division = APD
  - b. Note Type = Support Plan

- c. Note Subtype = Consumer Choice
- d. Note = Document details of interview/site visit
- e. Status = Complete

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

Notes Details	
Division *	APD
Note By *	Reed, Monica
Note Date *	03/30/2018
Program/Provider	
Note Type *	Support Plan
Note Sub-Type	Consumer Choice
Description	3/30 - Provider site visit completed
Note	
Status *	Complete
Date Completed	03/30/2018

7. Once the Provider has provided acknowledgment and the consumer has approved, the Waiver Support Coordinator can give the provider access to the consumer’s record. To do so navigate to the consumer’s record and click on the **Provider Selections** tab.

8. From the **File** menu, select **Add Provider**.

9. Complete the following fields:

- a. Provider = select the ellipsis to search for and select the provider
- b. Referral Type = Select applicable value
- c. Disposition = Referred
- d. Disposition Date = defaults to today and editable if needed
- e. Worker = change the default Provider Worker to the actual worker for the provider who indicated they were interested.

The screenshot shows the 'Provider' selection form in the iConnect system. The form is titled 'Provider' and has a 'File' menu. The form fields are as follows:

Division *	APD
Selected By	Buck, Jennifer
Selection Date	02/21/2020
Provider *	
Referral Type *	
Disposition *	
Disposition Date	02/21/2020
Provider Worker *	Buck, Jennifer
Comments	
Type of Bed	
Bed Capacity	
Bed Status	

10. When finished, from the File menu, select Save and Close Provider.

11. Later in the cost plan approval process, once the provider has been selected and approved by the Consumer, and added to the planned service, the WSC will update the status of the provider's Provider Selection record from Referred to Open.

12. Provider selection records with a status of Referred, opened for more than 30 days will automatically be closed by iConnect, removing the provider's access to the consumer record.

### Add Planned Services

- To add new planned services or update services with the selected provider, the WSC will navigate to the consumer's record and click on the **Plans** tab. Upon doing so, the consumer's Plan List View grid will open.
- In the consumer's Plan List View grid, open the relevant Plan > click on **Planned Services** subpage

**File Reports**

Plan Information	<b>Plan Details</b>	
Planned Services	Division *	APD
Cost Plan Review Notes	Program *	APD Waiver <span style="font-size: small;">Details</span>
	Worker	Buck, Jennifer <span style="font-size: small;">... Clear Details</span>
	Cost Plan Creation Date *	01/17/2020 <span style="font-size: small;">[Calendar]</span>
	Comments	<div style="border: 1px solid #ccc; height: 30px;"></div>
	Status *	Draft <span style="font-size: small;">v</span>
	Cost Plan Begin Date *	07/01/2020 <span style="font-size: small;">[Calendar]</span>
	Cost Plan End Date *	06/30/2021 <span style="font-size: small;">[Calendar]</span>

3. Click **File > Add Planned Service**.

4. A new Planned Service record opens. Update the following fields:

- a. Fiscal Year Choose the applicable fiscal year.  
NOTE: Fiscal Years in iConnect are in yyyy format. This is different than the yy – yy FY format APD is used to. For example: 20 – 21 FY = 2021 in 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 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. Geographic Differential: Select Geographic, Non-geographic or Monroe
- h. Provider Rate Type: Select Solo or Agency
- i. Service Code: Search for and select the service code.
- j. Unit Type auto populates when service code selected
- k. 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.
- l. Unit of Measure
- m. Total No of Units will auto-populate
- n. 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.
- o. Rate will auto populate and depending on the service code may or may not be editable.

- p. Max Amount will auto populate once the service code, rate and provider have been selected.
- q. Amount Requested = used by the Lead when the amount requested does not equal the amount approved
- r. Authorization Notes/Comments = enter notes. This is a required field. Text in this field will be visible on the Auth Service and printed authorization.
- s. Contract Number = enter if applicable.
- t. Non-Taxable = check if applicable.
- u. Planned Service Status = Proposed.

5. When finished, click **File > Save and Close Planned Service.**
6. Repeat the steps above for all relevant Providers/Services
7. Planned Services can be created in iConnect prior to the Provider Selection Process if desired. The Provider = Pending Provider should be used until the actual provider is selected. Once the actual provider is selected, remember to update the Provider Selection record for the provider from Referred to Open status.
8. Once the plan contains all necessary planned services, proceed to [Plan Validation](#). However, if services need to be edited or removed, those sections follow.

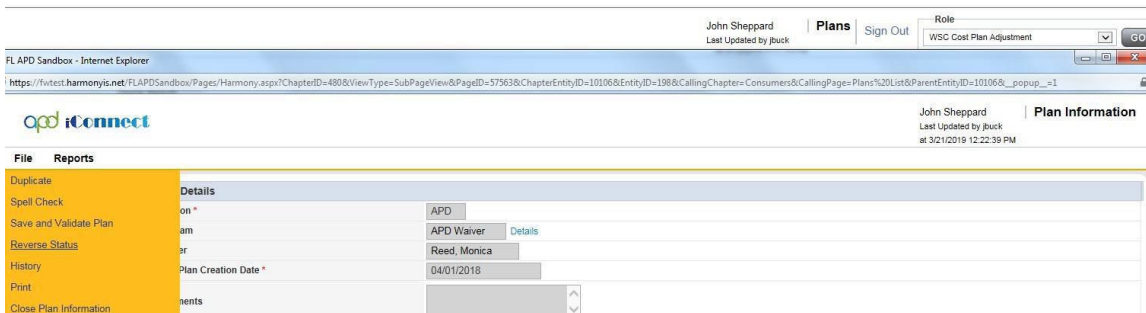
### Edit Planned Services

Planned services may be edited for several reasons. A planned service may exceed the budget and the dates need editing to decrease the amount requested. A planned service may only be partially approved following a region or state office review and the units may need to be decreased. Planned services are edited as a result of an approved provider expansion request. Regardless of the reason, the steps to edit the planned service are the same.

1. The Waiver Support Coordinator will log into iConnect.
2. Navigate to the consumer’s record and click the **Plan** tab. Select the APD waiver Plan.



3. The Plan Details page displays. If the Plan has already been validated and reviewed by the Region and/or State, the Status will equal Approved and the Plan will be read only. The WSC will need to Reverse the Status of the Plan before editing the Planned Services and/or adding new.
4. To do so, the WSC must use the WSC Cost Plan Adjustment Role.
5. Select the APD waiver Plan record with status = Approved. The Plan Information Page displays.
6. Click **File > Reverse Status**.



7. The record is now editable, and the **Plan Status** equals Draft.

**Plan Information**

Violet Sheppard | Plan Information  
Last Updated by Iritchie  
at 9/27/2019 12:40:06 PM

File Reports

**Plan Details**

Division \* APD

Program \* APD Waiver Details

Worker Reed, Monica Clear Details

Cost Plan Creation Date \* 07/01/2018

Comments

Status \* Draft

Cost Plan Begin Date \* 07/01/2018

Cost Plan End Date \* 06/30/2019

8. Click **File > Save Plan**.

9. Click the **Planned Services** subpage.

**Planned Services**

Violet Sheppard | Planned Services  
11/11/2019 12:11 PM

File Tools

Plan Information

**Planned Services**

Cost Plan Review Notes

Filters  
Max Amount +  
Search Reset

2 Planned Services record(s) returned - now viewing 1 through 2

Provider	Service Code	Service Description	Unit Type	Rate	Max Amount	Total No of Units	Amount Requested	Begin Date	End Date	Provider Rate Type	Service Ratio
Generic CDC+ Provider	H0043:UC	(4176) Residential Habilitation - Basic (day)	Day	\$39.60	\$1,900.80	48.0000		07/01/2018	06/30/2019	Agency	
WSC Agency1	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$1,784.28	12.0000		07/01/2018	06/30/2019	Solo	
					\$3,685.08	60.0000					

10. Select the planned service that needs to be changed to open the details page.

11. Update the planned service details as needed.

12. For each, change the **Planned Service Status** = Proposed.

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

14. Complete [Plan Validation](#).

### Remove Planned Services

Planned services may need to be deleted when an error is made or when a planned service is denied. The Planned services must be removed from the Plan to be

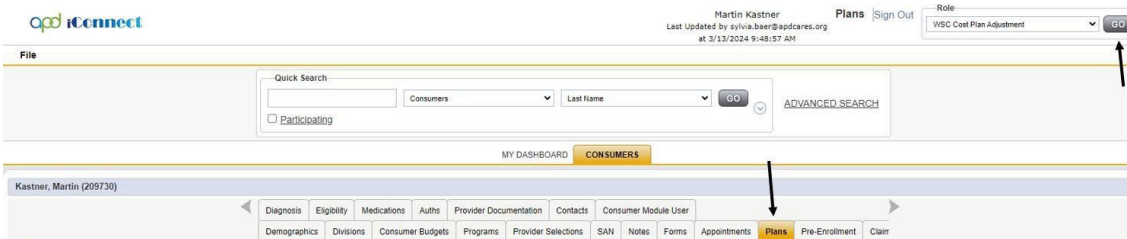
excluded from future plan validations. The WSC and other designated staff will have access to the WSC Cost Plan Adjustment role in iConnect. You cannot delete a planned service that has already been pushed to an authorization.

1. When a service is denied by the Region or State Office reviewer, the WSC will be notified by monitoring My Dashboard for incoming Notes. Note Type = Cost Plan Review. Sub Type = Not Approved.

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
10106	Sheppard, John	Cost Plan Review	Not Approved	09/25/2019	OT not approved	Buck, Jennifer	Pending
10106	Sheppard, John	ICF	Reason Timeline Unmet	06/25/2019		Buck, Jennifer	Pending
10106	Sheppard, John	QSI	QSI Request	06/25/2019		Buck, Jennifer	Pending
10172	Sheppard, Violet	ICF	Transition Planning	06/25/2019		Ritchie, Lesli	Pending
10106	Sheppard, John	ICF	Transition Planning	06/21/2019		Buck, Jennifer	Pending

2. To delete a planned service, select the WSC Cost Plan Adjustment Role.

3. Navigate to the consumer’s record and select the **Plans** tab.



4. Open the plan record. Select the **Planned Services** subpage.

5. From the Planned Services List view > select the planned service that is denied or added in error. The Plan Service Details page displays.

6. From the **File** menu > select **Delete Planned Service**. The Planned Service Record is deleted. Document details of the planned service that was deleted in error or because it was denied, in a Note.

7. From the **Plan** record select the **Cost Plan Review Notes** subpage.

8. From the **File** menu > select **Add Note**:

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

- a. Division = APD
- b. Note By = defaults to self
- c. Note Date = defaults to today
- d. Cost Plan Review Note = Yes
- e. Note Type = Deleted Planned Services

- f. Note = details of the services that were deleted because they were denied, or they were added in error
- g. Status = Complete

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

The screenshot shows the 'Notes' form in the iConnect system. The form is filled out with the following information:

- Division:** APD
- Note By:** Buck, Jennifer
- Note Date:** 09/25/2019
- Cost Plan Review Note?:** Yes
- Note Type:** Cost Plan Review
- Note SubType:** Not Approved
- Description:** denied OT
- Note:** Denied OT services - please remove from cost plan
- Status:** Pending
- Date Completed:** (empty)

Below the form, there are sections for Attachments and Recipients. The Attachments section has a link for 'Add Attachment'. The Recipients section has a 'Select a new Recipient' field and a 'Clear' button. Below this is a table of recipients:

Name	Date Sent	Date Read	Status	Date Signed	
Reed, Monica	9/25/2019		Unread		<a href="#">Remove</a>

11. Edits have been made to the plan, proceed to [Plan Validation.](#)

### Cost Plan Review Note

1. If additional communication is needed between the WSC and Region and or/State Office reviewers, a Note will be created in iConnect.
2. Navigate to the consumer's record and click the **Plans** tab. Open the current cost plan record. Select the **Cost Plan Review Notes** tab.
3. From the **File** menu > select **Add Note:**

The screenshot displays the iConnect interface for 'Cost Plan Review Notes'. The top navigation bar includes the 'opd iConnect' logo, the user name 'John Sheppard', the date '9/25/2019 12:11 PM', and the page title 'Cost Plan Review Notes'. Below the navigation bar is a 'File' menu. The main content area is divided into a sidebar on the left and a main panel on the right. The sidebar contains 'Plan Information', 'Planned Services', and 'Cost Plan Review Notes' (highlighted in orange). The main panel features a 'Filters' section with a dropdown arrow, a 'Note Type' field with a red asterisk, a 'Equal To' dropdown, a 'Cost Plan Review' dropdown, an 'AND' dropdown, and an 'X' button. Below the filters is a 'Note Date' dropdown and a '+' button. At the bottom of the main panel are 'Search' and 'Reset' buttons. Below the search area, it indicates '0 record(s) returned'.

4. In the new Note record, update the following fields:
  - a. Division = APD
  - b. Note By = defaults to self
  - c. Note Date = defaults to today
  - d. Cost Plan Review Note = Yes
  - e. Note Type = Cost Plan Review
  - f. Note Subtype = Plan Validation Review
  - g. Note = Describe issues with the Plan
  - h. Status = Pending
  - i. Route the Note to the appropriate Region/State Staff by clicking the **Lookup** button next to Add Note Recipient. In the pop-up window, type in the Worker's Last Name and click **Search**. In the Search results, click on the matching Worker Name to route the note to that recipient.
  
5. When finished, click **File > Save and Close Notes**

**Notes**

Division \* APD

Note By \* Buck, Jennifer

Note Date \* 09/25/2019

Program APD Waiver [Details](#)

Cost Plan Review Note? \* Yes

Note Type \* Cost Plan Review

Note SubType Plan Validation Review

Description

Note

Status \* Pending

Date Completed

**Attachments**

[Add Attachment](#)

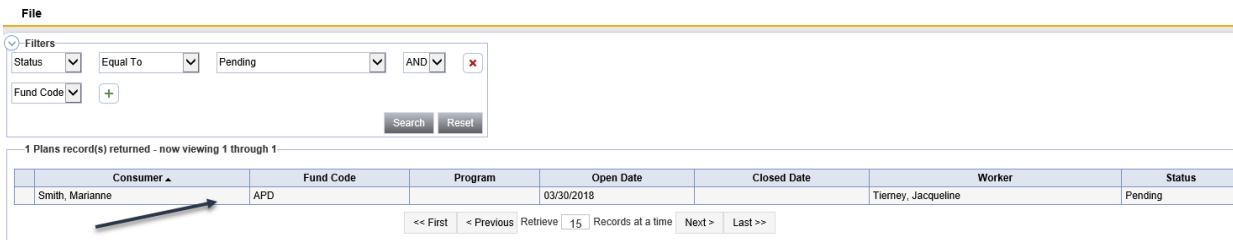
Document	Description	Category	Action
There are no attachments to display			

**Recipients**

6. The Region/State Staff will monitor their **My Dashboard** for new Pending Note records.
7. To do so, log into iConnect and set Role = Region Waiver Workstream Worker OR State Office Worker. Click **Go**.
8. Find the consumer's Panel and click on the link for Notes with Status = Pending. Click on the **Pending** link to open the Notes Queue:

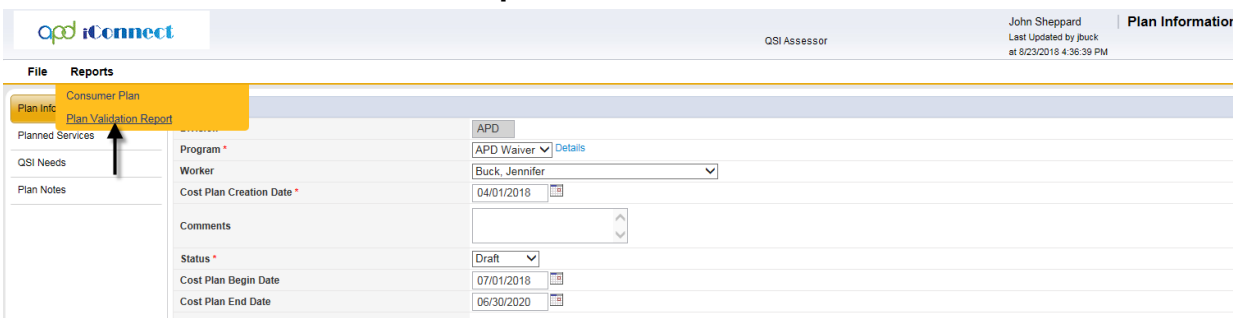
Ticklers	
Ticklers	134
Plans	
Approved	1
Draft	1
Pending	1
Appointments	
Scheduled	1

9. In the Notes Queue, open the Note record with Note Type = Cost Plan and Note Subtype = Plan Validation Review



10. Review the contents of the Note to understand the issues identified in the consumer’s Plan.

11. If needed, view the Plan Validation Report. Navigate to the consumer’s record and click on **Plans** tab > select the Plan to open. From the **Reports** menu in the toolbar select > **Plan Validation Report**.



12. The Region/State staff will document the request or other details as appended text to the Cost Plan Review Note.

13. Navigate to the Notes tab of the Consumer Record. Select the Note record with Note Type = Cost Plan and Note Subtype = Plan Validation Review to Open.

14. Update the following fields:  
 a. Notes = Append Notes with details

- b. Status = Complete. Keep Status Pending if expecting a response from the recipient.
- c. Note Recipient = Search for and select the Waiver Support Coordinator.

15. From the **File** menu > **select Save and Close Notes**.

16. The WSC will monitor his/her **My Dashboard** for new Note records and address issues as noted.

### Plan Validation

1. After adding all Providers/Services to the consumer's Cost Plan and/or edits to the Planned Services, *validate* the Cost Plan by clicking **File > Save and Validate Plan**:



#### Key Point

Make sure a Program is selected on the Plan Information page, otherwise plan validation option will not be visible.

2. The system will automatically apply relevant business rules to validate that the plan complies with all requirements and regulations

### Plan Passes Validation

1. If the Plan Passes Validation the system will display a message will be displayed indicating Plan has passed validation. Click OK.
2. On the **Plan Information** page, the WSC will change the Plan Status from Draft to No Review Required.
3. The Region or State Review field on the Plan Information page can remain blank.

4. If these are new Planned Services, the **Create Authorizations** menu option will appear on the **Planned Services** tab. Proceed to section [Create Authorizations](#).
5. If these are changes made to existing Planned Services that are linked to existing authorizations, the Update Authorizations menu option will appear on the Planned Services tab. Proceed to section [Update Authorizations](#)

**Plan Fails Validation**

1. If the Plan Fails Validation the system will return a message indicating that issues were identified.
2. If the Plan Failed Validation, identify issues with the Plan. Click **View Issues > Okay**.
  - a. A Report will appear that identifies issues that caused the Plan to fail Validation
  - b. The WSC will correct all services that failed validation that do not require Region or State Office review.
  - c. When finished, click **Save and Validate Plan** again to verify all services that originally failed validation are now resolved. The Plan will either pass Validation or require Region and/or State Office review.
3. If the Plan now passes Validation, and Region nor State Office review is required, the WSC will update the following fields:
  - a. On the **Planned Services** subpage, the WSC will update the **Planned Service Status** from Proposed to Approved for each planned service.
  - b. On the **Plan Information** page, the WSC will change the **Plan Status** from Draft to No Review Required.
  - c. Region or State Review is left blank.

d. On the Plan Information page, Select **Save Plan**.

e. Proceed to section [Create Authorizations](#).

The screenshot displays the 'Plan Information' page in the iConnect system. The page header includes the 'iConnect' logo, the text 'Last Updated by jbuck@apdcares.org at 4/29/2020 12:01:52 PM', and the title 'Plan Information'. The main content area is titled 'Plan Details' and contains the following fields:

Division *	APD
Program *	APD Waiver <a href="#">Details</a>
Worker	Buck, Jennifer <a href="#">Clear</a> <a href="#">Details</a>
Cost Plan Creation Date *	06/01/2020
Comments	
Status *	No Review Required
Cost Plan Begin Date *	07/01/2020
Cost Plan End Date *	06/30/2021
Region or State Review	

4. If the Plan fails validation for Region Review, the WSC will update the following fields on the Plan Information page:
  - a. Change the **Worker** from the WSC to the Region reviewer, to route this plan to the Region reviewer's My Dashboard > Consumer Plans Queue for review.
  - b. Change the **Plan Status** from Draft to Pending.
  - c. Region or State Review: Select the region that will be completing the review. In addition to routing this plan to the Region reviewer, it will also be routed to a generic pending plans queue where it can be reviewed by more than one regional reviewer, in case back up is needed.
5. Click **File > Save and Close Plan**.
6. Proceed to section [Region Review](#).

The screenshot displays the 'Plan Information' page in the iConnect system. The page is titled 'Plan Information' and includes a navigation menu with 'File' and 'Reports'. The main content area is divided into two sections: 'Plan Information' (left sidebar) and 'Plan Details' (main form). The 'Plan Details' section contains the following fields:

- Division: APD
- Program: APD Waiver (with a 'Details' link)
- Worker: Buck, Jennifer (with a 'Clear' button and a 'Details' link)
- Cost Plan Creation Date: 06/01/2020
- Comments: (empty text area)
- Status: Pending
- Cost Plan Begin Date: 07/01/2020
- Cost Plan End Date: 06/30/2021
- Region or State Review: A dropdown menu is open, showing options: Central, Northeast, Northwest, Southern, Southeast, Suncoast, and State Office.

7. If the Plan fails validation for Region AND State Office review, the Region review will be completed first, then routed to the State for review.
8. The WSC will update the following fields on the Plan Information page:
  - a. Change the **Worker** from the WSC to the Region reviewer, to route this plan to the Region reviewer's My Dashboard > Consumer Plans Queue for review.
  - b. Change the **Plan Status** from Draft to Pending.
  - c. Region or State Review: Select the region that will be completing the review. In addition to routing this plan to the Region reviewer, it will also be routed to a generic pending plans queue where it can be reviewed by more than one regional reviewer, in case back up is needed.
9. Click **File > Save and Close Plan**.
10. Proceed to section [Region Review](#).

APD iConnect | Last Updated by jbuck@apdcares.org at 4/29/2020 12:01:52 PM | Plan Information

File Reports

Plan Information

Planned Services

Cost Plan Review Notes

**Plan Details**

Division \* APD

Program \* APD Waiver Details

Worker Buck, Jennifer Clear Details

Cost Plan Creation Date \* 06/01/2020

Comments

Status \* Pending

Cost Plan Begin Date \* 07/01/2020

Cost Plan End Date \* 06/30/2021

Region or State Review \*  
Central  
Northeast  
Northwest  
Southern  
Southeast  
Suncoast  
State Office

11. If the Plan fails validation for State Office review the WSC will update the following fields on the Plan Information page:

- a. Change the **Worker** from the WSC to the State Office reviewer, to route this plan to the State Office reviewer’s My Dashboard > Consumer Plans Queue for review.
- b. Change the **Plan Status** from Draft to Pending.
- c. Region or State Review: Select State Office who will be completing the review. In addition to routing this plan to the State Office reviewer, it will also be routed to a generic pending plans queue where it can be reviewed by more than one State Office reviewer, in case back up is needed.

12. Click **File > Save and Close Plan**.

13. Proceed to section [State Office Review](#).

APD iConnect | Last Updated by jbuck@apdcares.org at 4/29/2020 12:01:52 PM | Plan Information

File Reports

Plan Information

Planned Services

Cost Plan Review Notes

**Plan Details**

Division \* APD

Program \* APD Waiver Details

Worker Buck, Jennifer Clear Details

Cost Plan Creation Date \* 06/01/2020

Comments

Status \* Pending

Cost Plan Begin Date \* 07/01/2020

Cost Plan End Date \* 06/30/2021

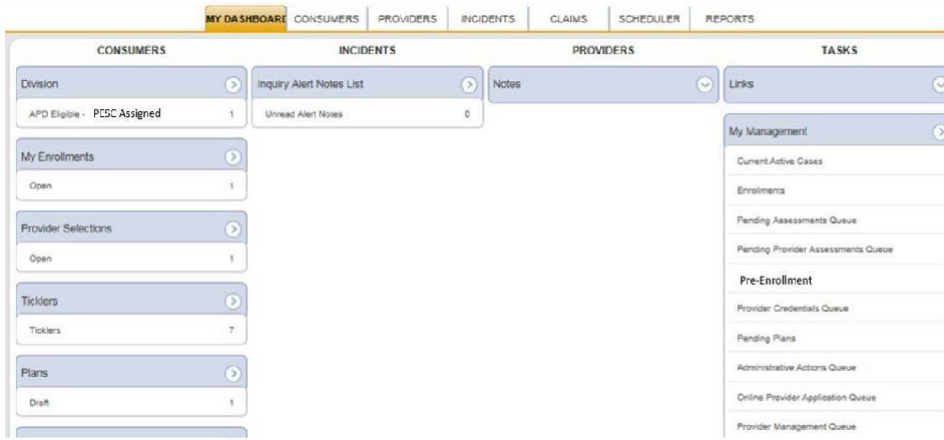
Region or State Review \* State Office

### Region Review

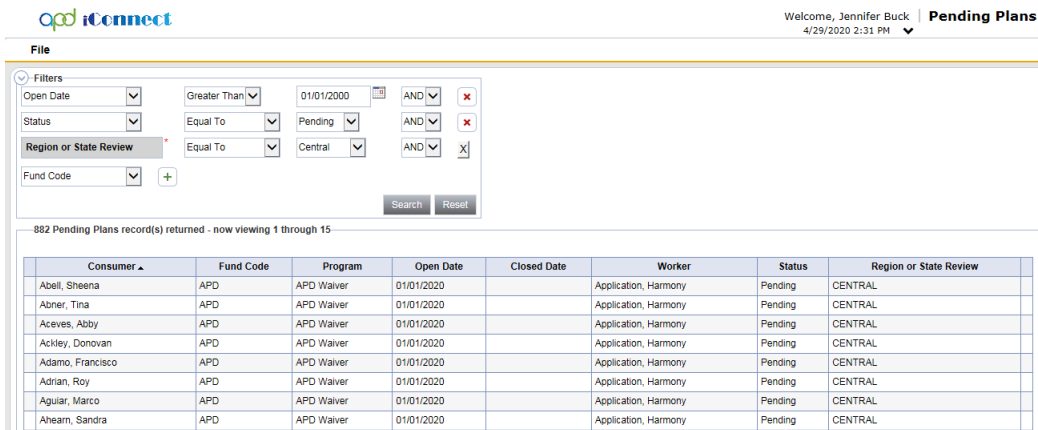
1. The plan failed has failed validation and requires Region review for one or more services.
2. The WSC has assigned the Region reviewer as the worker on the Plan Information page and the status of the plan is pending.
3. The WSC has also specified the region completing the review which allows more than the assigned Region reviewer access to review this plan, in case back up is needed.
4. The Region Reviewer will monitor his/her **My Dashboard** for new Pending Plans.
5. To do so, log into iConnect and Set Role = Region Waiver Workstream Worker. Click **Go**.
6. Find the consumer's Panel and click on the link for Plans with Status = Pending. Click on the **Pending** link to open the Plans queue. Skip to step 9.

Ticklers	
Ticklers	134
Plans	
Approved	1
Draft	1
Pending	1
Appointments	
Scheduled	1

7. To monitor all plans that require review by region, from **My Dashboard**, Under the Tasks panel, select **My Management**, then **Pending Plans**.

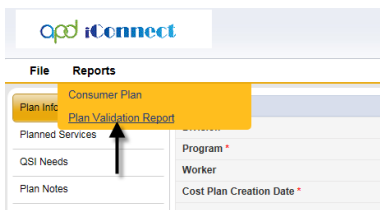


8. The Pending Plans queue defaults to display plans with a status of Pending and requires the reviewer to select a Region search filter. Select Search to display the plans that require review for the selected region.



9. From the Plans queue, select the plan to open the Plan Information page.

10. View the Plan Validation Report. In the Plan Record > from the Reports menu in the toolbar select > Plan Validation Report.



11. The Report opens in a new window. View the most current validation and validation history.

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### Plan Validation Report

**Consumer:** Violet Sheppard      **Program:** APD Waiver  
**Case No:** 10172      **Plan Start Date:** 7/1/19  
**Division:** APD      **Plan End Date:** 6/30/20

**Current Validation Results**

Service	Proposed	Problem(s)
n/a	n/a	<ul style="list-style-type: none"> <li>All initial plans require Regional review.</li> <li>This consumer does not have a consumers budget linked.</li> </ul>
(4270) Support Coordination	Units Per: 1.00 Units of Measure: Month - Round Up Total Units: 12.0000 Total Cost: \$1,784.28	<ul style="list-style-type: none"> <li>The planned services are not allowed to be prior dates.</li> </ul>

**Validation History**

Validation Date Time	User	Action	Reason
3/7/19 10:41 AM	Jennifer Buck	Failed - View Report	

12. Complete the Region review for each Planned Service that failed Validation and requires Region review.

- a. If the service is approved, change the **Planned Service Status** = Region Review Approved.
- b. If the service is partially approved, edit the planned service details to decrease the max amount. Change the **Planned Service Status** = Region Review Partially Approved
- c. If the service is Denied, change the **Planned Service Status** = Region Review Denied. The Region Reviewer will send a Note to the WSC with details of the Denied services and the WSC will Delete the denied planned services from the Plan. Proceed to section [Services Not Approved](#).

13. Enter a supporting comment in the **Region/State Office review Comments (REQUIRED)** field. Select **Append Text to Note**.

14. Enter any comments that need to display on the authorization into the **Authorization Notes/Comments** field, in addition to the existing comments from the WSC.
15. Click **File > Save and Close Planned Service**.
16. The reviewer will complete this process for all planned services that require region review.
17. When the Region review is complete, and if there are no services that require State Office review, route the plan back to the WSC. The Region reviewer will update the following fields on the **Plan Information** Page:
  - a. Change the **Worker** from the Region Reviewer to the WSC, to route this plan to the WSC’s My Dashboard > Consumer Plans Queue for review.
  - b. Change the **Plan Status** from Pending to Approved. When the Plan Status = Approved, the plan is read only but authorizations can still be created for plans that pass validation.  
 NOTE: The overall cost plan is approved, but there may be some planned services in the cost plan that were partially approved and therefore reduced or denied.
  - c. Region or State Review: can remain as is. No changes are needed.

- 18. On the **Plan Information** Page, select **File > Save and Validate Plan**.
- 19. The Plan will pass validation if no services were denied. Proceed to section [Create Authorizations](#).
- 20. The Plan will not pass validation if services were denied. The WSC will delete the denied planned service before the plan will pass validation. Proceed to section [Services Not Approved](#).

The screenshot shows the 'Plan Information' page in the iConnect system. The page title is 'Plan Information' and it was last updated by jibuck@apdcares.org at 4/29/2020 12:01:52 PM. The page has a navigation menu with 'File' and 'Reports' options. The main content area is titled 'Plan Details' and contains the following fields:

Division *	APD
Program *	APD Waiver <a href="#">Details</a>
Worker	Buck, Jennifer <a href="#">...</a> <a href="#">Clear</a> <a href="#">Details</a>
Cost Plan Creation Date *	06/01/2020 <a href="#">...</a>
Comments	<input type="text"/>
Status *	Approved <a href="#">v</a>
Cost Plan Begin Date *	07/01/2020 <a href="#">...</a>
Cost Plan End Date *	06/30/2021 <a href="#">...</a>
Region or State Review	Central <a href="#">v</a>

- 21. If there are services that require State Office review, route the plan to State Office reviewer. The Region reviewer updates the following fields on the Plan Information page:
  - a. Change the **Worker** from the Region reviewer to the WSC.
  - b. Keep the **Plan Status** as Pending.
  - c. Region or State Review: change to State Office
- 22. Click **File > Save and Close Plan**
- 23. Proceed to section [State Office review](#).

### State Office Review

1. The plan failed has validation and requires State Office review for one or more services. The WSC or the Region Reviewer has Updated the APD waiver Plan with Status = Pending and Region or State Review = State Office.
2. The State Office reviewer will monitor his/her **My Dashboard** for new Pending Plans.
3. To do so, log into iConnect and Set Role = State Office Process Owner. Click **Go**.
4. Find the consumer's Panel and click on the link for Plans with Status = Pending. Click on the **Pending** link to open the Plans queue.
  - a. If there are none, proceed to step 6, locating all plans waiting for State Office review.

Ticklers	
Ticklers	134
Plans	
Approved	1
Draft	1
Pending	1
Appointments	
Scheduled	1

- 5. Find the consumer's Panel and click on the link for Plans with Status = Pending. Click on the **Pending** link to open the Plans queue. Skip to step 8.

Ticklers	
Ticklers	134
Plans	
Approved	1
Draft	1
Pending	1
Appointments	
Scheduled	1

- 6. To monitor all plans that require State Office review, from **My Dashboard**, Under the Tasks panel, select **My Management**, then **Pending Plans**.

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

CONSUMERS: Division (APD Eligible - PESC Assigned: 1), My Enrollments (Open: 1), Provider Selections (Open: 1), Ticklers (7), Plans (Draft: 1)

INCIDENTS: Inquiry Alert Notes List (Unread Alert Notes: 0)

PROVIDERS: Notes

TASKS: My Management (Current Active Cases, Enrollments, Pending Assessments Queue, Pending Provider Assessments Queue, Pre-Enrollment, Provider Credentials Queue, Pending Plans, Administrative Actions Queue, Online Provider Application Queue, Provider Management Queue)

- 7. The Pending Plans queue defaults to display plans with a status of Pending and requires the reviewer to select a State Office search filter. Select Search to display the plans that require review for the selected region.

Filters

Open Date: Greater Than 01/01/2000 AND

Status: Equal To Pending AND

Region or State Review: Equal To State Office AND

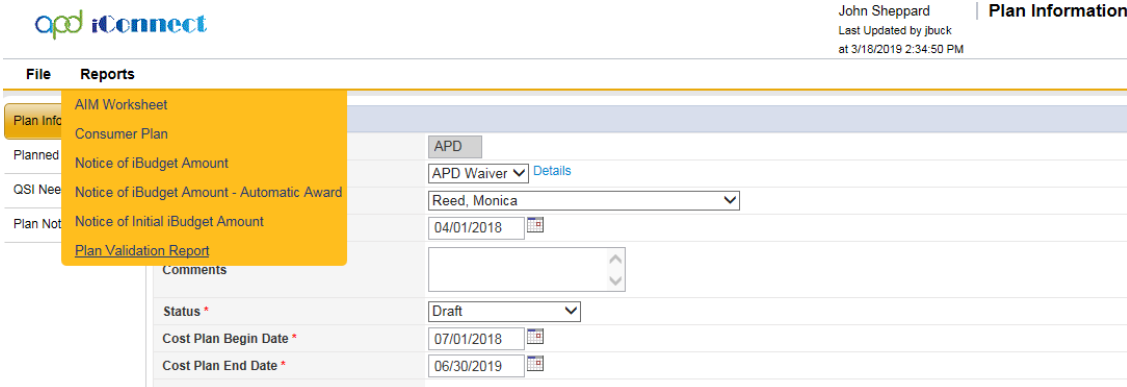
Fund Code: +

Search Reset

- 8. From the Plans queue, select the plan to open the Plan Information page.

9. In the Plans queue, open the Plan Record.

10. View the Plan Validation Report. In the **Plan Record** > from the **Reports** menu in the toolbar select > **Plan Validation Report**.



11. The Report opens in a new window. View the most current validation and validation history.

The screenshot shows the 'Plan Validation Report' window. At the top left is the 'harmony INFORMATION SYSTEMS, INC.' logo. The title is 'Plan Validation Report'. Below this, there are two columns of details:
 

- Consumer:** Violet Sheppard
- Case No:** 10172
- Division:** APD
- Program:** APD Waiver
- Plan Start Date:** 7/1/19
- Plan End Date:** 6/30/20

 Below the details is a section titled 'Current Validation Results' with a table:
 

Service	Proposed	Problem(s)
(4142) Personal Supports	Units Per: 8.00 Units of Measure: Calendar Day Total Units: 2920.0000 Total Cost: \$ 29200.00	* This service requires State review due to the amount of the total service amount

 Below the table is a section titled 'Validation History' with another table:
 

Validation Date Time	User	Action	Reason
3/7/19 10:41 AM	Jennifer Buck	Failed - View Report	

12. Complete the State Office review for each Planned Service that failed Validation and requires State Office review.

- a. If the service is approved, change the **Planned Service Status** = State Office review Approved.
- b. Enter supporting comments in the **Region/State Office review Comments** field. Select **Append Text to Note**.

- c. Enter any comments that need to display on the authorization into the Comments field, in addition to the existing comments from the WSC and/or Region.
- d. If the service is partially approved, edit the planned service details to decrease the max amount. Change the **Planned Service Status** = State Office review Partially Approved.
- e. Enter supporting comments in the **Region/State Office review Comments** field. Select **Append Text to Note**.

Service Code *	92507:UC
Service Description	(4260) Speech Therapy
Unit Type	15 mins
Units Per *	4.00
Units of Measure *	Calendar Day
Total No of Units	1460.0000
Provider ID *	10017 <a href="#">Details</a>
Provider	Achieving Independence
Rate *	\$16.02
Max Amount *	\$23,389.20
Amount Requested	
Authorization Notes/Comments	regular comments field for WSC - displays on Auth.
Contract Number	
Non-Taxable	<input type="checkbox"/>
Planned Service Status	State Review Approved
Region Review Comments from Planned Services	On 10/29/2019 at 4:18 PM, Jennifer Buck wrote: State Review Comments
Region/State Review Comments (REQUIRED)	New Text
	<a href="#">Append Text to Note</a>

- a. If the service is Denied, change the **Planned Service Status** = State Office review Denied. The State Office reviewer will send a Note to the WSC with details of the Denied services and the WSC will Delete the denied planned services from the Plan.

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

14. The reviewer will complete this process for all planned services that require State Office review.

15. When the State Office review is complete for all services that require State Office review, the State Office reviewer will route the plan back to the WSC.

16. The State office reviewer will update the following fields on the **Plan Information** Page:

a. Change the **Worker** from the State Office reviewer to the WSC, to route this plan to the WSC’s My Dashboard > Consumer Plans Queue for review.

b. Change the **Plan Status** from Pending to Approved. When the Plan Status = Approved, the plan is read only but authorizations can still be created for plans that pass validation.

NOTE: The overall cost plan is approved, but there may be some planned services in the cost plan that were partially approved and therefore reduced or denied.

c. Region or State Review: can remain as is. No changes needed.

17. On the **Plan Information** Page, select **File > Save and Validate Plan**.

18. The Plan will pass validation if no services were denied. Proceed to section [Create Authorizations](#).

19. The Plan will not pass validation if services were denied. The WSC will delete the denied planned service before the plan will pass validation. Proceed to section [Services Not Approved](#).

The screenshot shows the 'Plan Information' page in the iConnect system. The page title is 'Plan Information' and it was last updated by 'jbuck@apdcares.org' on 4/29/2020 at 12:01:52 PM. The page has a navigation menu with 'File' and 'Reports'. The main content area is titled 'Plan Details' and contains the following fields:

Division *	APD
Program *	APD Waiver <a href="#">Details</a>
Worker	Buck, Jennifer <a href="#">Clear</a> <a href="#">Details</a>
Cost Plan Creation Date *	06/01/2020
Comments	
Status *	Approved
Cost Plan Begin Date *	07/01/2020
Cost Plan End Date *	06/30/2021
Region or State Review	State Office

### Services Not Approved

1. The WSC has submitted a plan for Region and/or State Office review and one or more planned services in the plan has been Denied.

2. The Region or State Office reviewer has changed the Planned Service Status for the service not approved to Region or State Office review Denied.

3. The Region or State Office reviewer will notify the WSC of the denied services via a Note and the WSC will delete the planned service from the plan so Plan Validation will pass, and authorizations can be created for the remaining approved services on the plan.
4. The Region or State Office reviewer will navigate to the consumer's record, click on **Plans** > select the **Plan** record to open the Plan Information subpage. Select the **Cost Plan Review Notes** subpage.

5. From the **File** menu > select **Add Note**:

The screenshot shows the iConnect system interface. At the top, the user is identified as John Sheppard on 9/25/2019 at 12:11 PM. The page title is 'Cost Plan Review Notes'. A 'File' menu is visible at the top left. On the left sidebar, there are three main sections: 'Plan Information', 'Planned Services', and 'Cost Plan Review Notes' (which is highlighted in orange). The main content area features a search filter box with the following details:
 

- Filters: Note Type (dropdown), Equal To (dropdown), Cost Plan Review (dropdown), AND (dropdown), X (clear button)
- Note Date (dropdown) with a plus sign (+) to add more filters
- Search and Reset buttons
- 0 record(s) returned

6. In the new Note record, update the following fields:
  - a. Division = APD
  - b. Note By = defaults to self
  - c. Note Date = defaults to today
  - d. Cost Plan Review Note = Yes
  - e. Note Type = Cost Plan Review
  - f. Note Subtype = Not Approved
  - g. Note = Explain why Plan is not approved
  - h. Status = Complete or Pending if a response has been requested from the WSC.
  - i. Route the Note to the appropriate WSC/Pre-Enrollment Support Coordinator by clicking the **Lookup** button next to Add Note Recipient. In the pop-up window, type in the Worker's Last Name and click **Search**. In the Search results, click on the matching Worker Name to route the note to that recipient.  
 In the event the full cost plan is not approved, route the Note to the appropriate Region staff.  
 The Region Staff will issue a notice and check if the Consumer exercises Due Process.

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

**Notes**

Division \*

Note By \*

Note Date \*

Cost Plan Review Note? \*

Note Type \*

Note SubType

Description

Note 

Denial OT services - please remove from cost plan

Status \*

Date Completed

---

**Attachments**

[Add Attachment](#)

**Attachments Grid**

Document	Description	Category	Action
There are no attachments to display			

---

**Recipients**

Select a new Recipient:

**Note Recipients Grid**

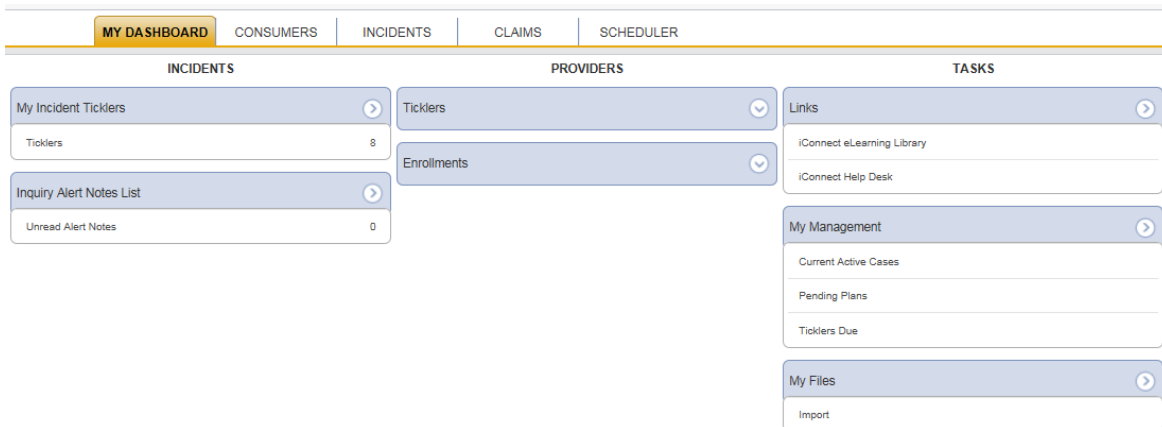
Name	Date Sent	Date Read	Status	Date Signed	
Baer, Sylvia	10/30/2024		Unread		<a href="#">Remove</a>

8. The WSC will monitor My Dashboard for incoming Notes and review the Cost Plan Review > Not Approved Note.
9. The WSC will navigate to the consumer’s record and delete the denied planned services from the cost plan.
10. Proceed to section [Remove Planned Services](#).
11. When the full cost plan is not approved, The Region Staff will monitor My Dashboard for incoming Notes. After reviewing the note, the regional staff issue a notice and check if the Consumer exercises Due Process.
12. To issue the notice, from the consumer’s **Demographics** tab, click on the **Word Merge** menu and generate the appropriate notice.

13. In the Word Merge preview screen, click **Open Document** to open the letter in Microsoft Word. Edit and print the document. Then save it to your computer.
14. Back in the Word Merge preview screen, click **Upload and Save to Note** > select the appropriate document to attach to the Note record. In the new Consumer Note record, update the following fields:
  - a. Division = APD
  - b. Note Type = Cost Plan Review
  - c. Note Subtype = Not Approved
  - d. Status = Complete
15. When finished, click **File > Save and Close Note**

### Create Authorization

1. Once the Planned services have passed Plan validation or have been reviewed by the Region or State Office reviewer and approved, the Create Authorization option will be visible to the user. The WSC will create the authorizations.
2. If the plan passed validation and did not require Region or State Office review, skip to step 6.
3. The WSC will monitor the Pending Plans queue on My Dashboard for approved plans. Navigate to **My Dashboard > Tasks > Pending Plans Queue**.



4. Filter the pending plans queue for those with status equal to Approved, and possibly additional date filters to display only recent plans.

Open Date Greater Than 01/01/2000 AND Status Equal To Approved AND Fund Code

4 Pending Plans record(s) returned - now viewing 1 through 4

Consumer	Fund Code	Program	Open Date	Closed Date	Worker	Status
Sample, Thomas	APD	APD Waiver	05/08/2018		Ritchie, Lesli	Approved
Smith, June	APD	APD Waiver	05/21/2018		Ritchie, Lesli	Approved
Smith, Mary	APD	APD Waiver	05/22/2018		Ritchie, Lesli	Approved
Training, EVV	APD	APD Waiver	03/10/2020		Ritchie, Lesli	Approved

5. Select one of the plans from the queue. The Plan Information page displays.
6. Click the **Planned Services** subpage.
7. Add a check next to each **Planned Service** that has been validated and is ready to be pushed to an Authorization.
8. Click **File > Create Authorizations**.

Alice Sheppard 6/25/2018 5:54 PM | Planned Services

File Tools

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

Services record(s) returned - now viewing 1 through 7

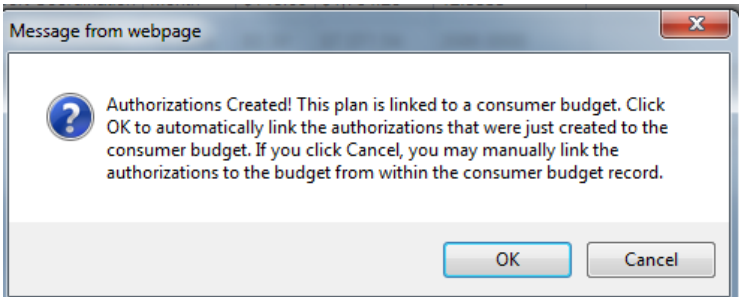
Provider	Service Code	Service Description	Total No of Units	Unit Type	Rate	Max Amount	Begin Date	End Date	Auth ID
A TEST Provider	4250	Specialized Mental Health Counseling Assessment	1.0000	Units	\$128.21	\$128.21	04/01/2018	06/30/2018	<input checked="" type="checkbox"/>
A TEST Provider	4320	Transportation - Trip	88.0000	Trip	\$10.00	\$880.00	05/01/2018	06/30/2018	<input checked="" type="checkbox"/>
APD Test Provider	4083	Life Skills Development - Level 2 (Supported Employment - Individual)	260.0000	15 mins	\$9.56	\$2,485.60	04/01/2018	06/30/2018	<input type="checkbox"/>

9. The message Authorization Created will display if operation was successful and an Auth ID will be assigned. The details of the Authorization are visible on the Planned Service and the Authorization tab.

2 Planned Services record(s) returned - now viewing 1 through 2

Provider	Service Code	Service Description	Unit Type	Rate	Max Amount	Total No of Units	Amount Requested	Begin Date	End Date	Provider Rate Type	Service Ratio	Consumer County
Achieving Independence	G9012.UC	(4270) Support Coordination	Month	\$148.69	\$1,784.28	12.0000		07/01/2020	06/30/2021	Agency		LEON
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				
140908	298	07/01/2020	06/30/2021	Approved	07/01/2020	06/30/2021	Approved	Ready to Send				
ResCare For You	S5151.UC	(4221) Respite - Quarter Hour	15 mins	\$3.39	\$7,071.54	2086.0000		07/01/2020	06/30/2021	Agency	1:1	LEON
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				
140909	299	07/01/2020	06/30/2021	Approved	07/01/2020	06/30/2021	Approved	Ready to Send				

- The message also describes the plan is linked to a budget and the application will automatically link these authorizations to the budget.



### Authorization Interface

- Navigate to the **Authorization** tab to view your newly created Auth.
- Once you locate your Auth, click on the expansion row that shows the auth information & view the **Auth EDI Status = Ready to Send**

File Reports Tickers View Consumer Incident

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

Demographics Divisions Consumer Budgets Programs Provider Selections SAN Notes Forms Appointments Plans Pre-enrollment Payers

Filters  
Division: [Dropdown] [Search] [Reset]

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

Auth Service ID	Service Code	Service	Start Date	Unit Type	End Date	Auth Service EDI Status	Max Units	Status	Rate	Amount Approved	Cancelled	Provider Rate Type	Consumer County	Service Ratio
140094	92507:UC	(4260) Speech Therapy	05/13/2019	15 mins	06/30/2019	Ready to Send	140	Approved	\$16.02	\$2,242.80	No	Agency	Hernando	
140093	S5130:UC	(4140) Personal Supports	05/01/2019	15 mins	06/30/2019	Ready to Send	172	Approved	\$3.82	\$657.04	No	Agency	Hernando	1:1

- The Authorization interfaces are scheduled to run at least daily. The **Auth Service EDI Status** is updated.

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

Demographics Divisions Consumer Budgets Programs Provider Selections SAN Notes Forms Appointments Plans Pre-enrollment Payers

Filters  
Division: [Dropdown] [Search] [Reset]

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

Auth Service ID	Service Code	Service	Start Date	Unit Type	End Date	Auth Service EDI Status	Max Units	Status	Rate	Amount Approved	Cancelled	Provider Rate Type	Consumer County	Service Ratio
140094	92507:UC	(4260) Speech Therapy	05/13/2019	15 mins	06/30/2019	Sent	140	Approved	\$16.02	\$2,242.80	No	Agency	Hernando	
140093	S5130:UC	(4140) Personal Supports	05/01/2019	15 mins	06/30/2019	Sent	172	Approved	\$3.82	\$657.04	No	Agency	Hernando	1:1

- When the **Auth response** comes back from **FMMIS**, the system again updates the Auth Status, Auth Service Status and Auth Service EDI Status.
- If there was an issue with sending the Auth to **FMMIS**, the **Auth Service EDI Status** will be updated to **Unable to Send**.

Division	Provider	Auth ID	Start Date	End Date	Status	Cancelled
APD	Pending Provider	232432	06/05/2019	06/30/2019	Approved	No
APD		232433	06/05/2019	06/30/2019	Approved	No
APD		232434	06/05/2019	06/30/2019	Approved	No
APD		177960	01/01/2019	06/30/2019	Approved	No
APD		178448	01/01/2019	06/30/2019	Approved	No
APD		189305	01/01/2019	06/30/2019	Approved	No
APD		232290	01/01/2019	06/30/2019	Fully Approved	No
APD		232141	07/01/2018	06/30/2019	Terminated	Yes
APD		232162	07/01/2018	06/30/2019	Fully Approved	No
APD		232193	07/01/2018	06/30/2019	Fully Approved	No
APD		232154	07/01/2018	06/30/2019	Fully Approved	No
APD	A TEST Provider	232231	07/01/2018	11/30/2018	Approved	No

6. Reasons an Auth is unable to send:

- Waiver Consumer Medicaid ID is blank
- Max amount cannot be 0.00
- Unit cost cannot be 0.00
- Waiver Consumer does not have Active Medicaid Eligibility record
- Provider ID not Active

7. For authorizations that are rejected or unable to send, the reason is visible on the **Error Message** subpage on the Auth Service details page.

The authorized service is out of sync with the planned service to which it is linked.

**Authorized Service**

PK Number: [Redacted]

Start Date: 07/01/2018

End Date: 11/30/2018

Index/SubObject:

IndexCode	Index Description	SubObject	SubObject Description
Central	Central Region	Waiver	iBudget Waiver

Service Code: S5102.UC

Secondary Code: S5102.UC

Service Description: (4882) Life Skills Development - Level 3 (ADT) - Facility Based

Unit Type: Hour

Units Per: 6.00

Units of Measure: Calendar Day

Max. Units: 918

Rate: \$15.85

Amount Approved: \$14,550.30

Auth Service EDI Status: Unable to Send

Status: Resubmitted

Worker: [Redacted]

Date Approved: [Redacted]

Comments: test

Diagnosis1: [Redacted]

Diagnosis2: [Redacted]

8. A list view of the error message details displays.

The screenshot shows the iConnect 'Error Message' interface. At the top, it says '1 Error Message record(s) returned - now viewing 1 through 1'. Below this is a table with the following data:

Date	Source	Code	Error Message	Code Type	Action Code	Action Message
5/14/2020 4:53:23 PM	FMMIS	06	RECIPIENT NOT ELIGIBLE			

Navigation controls at the bottom include '<< First', '< Previous', 'Retrieve 15 Records at a time', 'Next >', and 'Last >>'.

Authorization Service Approved

1. Example of an Approved Auth

The screenshot shows the 'Auths' list view in iConnect. The table displays 13 records. The record for 'A Test Provider' is highlighted in yellow. The table columns include: Division, Provider, Auth ID, Start Date, End Date, Status, and Cancelled.

Division	Provider	Auth ID	Start Date	End Date	Status	Cancelled
APD	Pending Provider	232432	06/05/2019	06/30/2019	Approved	No
APD		232433	06/05/2019	06/30/2019	Approved	No
APD		232434	06/01/2019	06/30/2019	Approved	No
APD		177980	01/01/2019	06/30/2019	Approved	No
APD		178648	01/01/2019	06/30/2019	Approved	No
APD		185935	01/01/2019	06/30/2019	Approved	No
APD	A Test Provider	232250	01/01/2019	06/30/2019	Fully Approved	No

Below the table is a summary row with columns: Auth Service ID, Service Code, Service, Start Date, Unit Type, End Date, Auth Service EDI Status, Max Units, Status, Rate, Amount Approved, Cancelled, Provider Rate Type, Consumer County, and Service Ratio.

The screenshot shows the 'Authorization' detail view for the 'A Test Provider' record. It displays the following information:

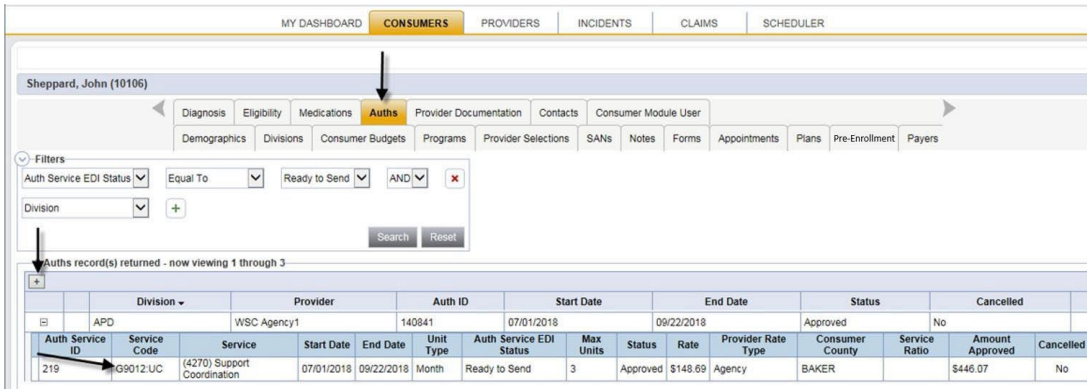
- Start Date: 01/01/2019
- End Date: 06/30/2019
- Division: APD
- Fiscal Year: 2019
- Provider: A Test Provider
- Date Authorized: 03/21/2019
- AuthID: 232250
- Status: Fully Approved

The screenshot shows the 'Authorized Service' detail view. It displays the following information:

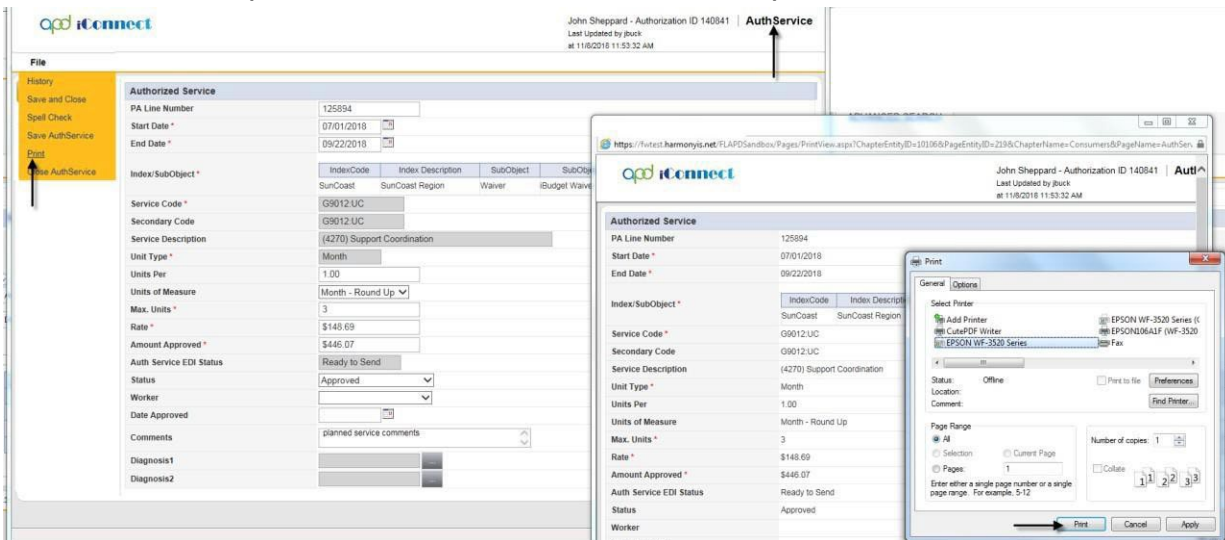
- PA Number: 5119119010
- Start Date: 01/01/2019
- End Date: 06/30/2019
- Index/SubObject: Central Central Region Waiver iBudget Waiver
- Service Code: T2003:UC
- Secondary Code: T2003:UC
- Service Description: (4320) Transportation - Trip
- Unit Type: Trip
- Units Per: 80.00
- Units of Measure: Month - Round Up
- Max. Units: 480
- Rate: \$20.00
- Amount Approved: \$9,600.00
- Auth Service EDI Status: Approved
- Status: Approved

### Print the Authorization

1. To print the authorization, navigate to the Authorizations tab.
2. Locate the Authorization and select the + link to display the AuthService detail.
3. Select the authorized Service.



4. From the toolbar, click File > Print.
5. A separate window opens and a print dialog window.
6. Select the printer or PDF Writer and click OK to print.



7. The Auth Service detail page can now be closed.
8. When the service providers are live in iConnect, they will be able to log into iConnect and view the authorizations associated to their provider record.

Division	Case No	Consumer	Auth ID	Auth Start Date	Auth End Date	Auth Status	Last Updated
APD	10002	Reed,Test	140629	10/18/2017	10/31/2017	Terminated	10/18/2017 6:15:01 PM
APD	10002	Reed,Test	140630	11/03/2017	11/04/2017	Approved	5/2/2018 2:15:26 PM
APD	10007	Peahrdy,J ayia	140632	11/21/2017	06/30/2018	Approved	11/21/2017 5:12:30 PM
APD	10017	Sampe,Thomas	140634	11/29/2017	06/30/2018	Terminated	12/7/2017 11:44:15 AM
APD	10018	Sampe,CDC	140635	12/01/2017	06/30/2018	Approved	11/30/2017 1:57:10 PM
APD	10022	Sampe,Transfer	140637	12/07/2017	06/30/2018	Terminated	12/7/2017 12:08:35 PM
APD	10023	Sampe,Transfer Two	140639	12/07/2017	06/30/2018	Approved	12/7/2017 9:00:43 AM

### Authorization Service Rejected

1. FMMIS may reject all or some of the services on an authorization. If all services on the authorization are rejected the FMMIS Auth interface will change the Auth Status to Rejected.
2. If one or more services on the authorization are rejected but at least one is approved, the FMMIS Auth interface will change the Auth Status to Partially Approved.
3. The next steps the WSC take depends on the reason for the rejection.
4. The reason for the rejection is visible on the Authorization. Navigate to the Authorization tab and selected the rejected authorization.

Division	Service	Provider	Auth ID	Start Date	End Date	Status	Cancelled
APD	Pending Provider		232432	06/30/2019	06/30/2019	Approved	No
APD			232433	06/30/2019	06/30/2019	Approved	No
APD			232434	06/30/2019	06/30/2019	Approved	No
APD			177980	01/01/2019	06/30/2019	Approved	No
APD			178648	01/01/2019	06/30/2019	Approved	No
APD			189835	01/01/2019	06/30/2019	Approved	No
APD			232260	01/01/2019	06/30/2019	Fully Approved	No
APD			232141	07/01/2018	06/30/2019	Terminated	Yes
APD			232152	07/01/2018	06/30/2019	Fully Approved	No
APD			232153	07/01/2018	06/30/2019	Fully Approved	No
APD			232154	07/01/2018	06/30/2019	Fully Approved	No
APD			232231	07/01/2018	11/30/2018	Approved	No
APD			232248	07/01/2018	06/30/2019	Rejected	No

5. The Authorization details page displays. Select the Auth Service subpage. The Auth Services list view displays.
6. Select the Auth Service. The Auth Services Details page displays. Click the **Error Message** subpage to view the Error Message from FMMIS.

The screenshot shows the 'Auth Service' form in the iConnect system. The left-hand navigation menu has 'Auth Service' selected, and 'Error Message' is highlighted with a red arrow. The main form area contains various fields for service details, including 'PA Number', 'Start Date', 'End Date', 'Index Code', 'Service Code', 'Secondary Code', 'Service Description', 'Unit Type', 'Units Per', 'Units of Measure', 'Max. Units', 'Rate', 'Amount Approved', 'Auth Service EDI Status', 'Status', 'Worker', 'Date Approved', and 'Comments'. The 'Auth Service EDI Status' and 'Status' fields are currently set to 'Rejected'.

The screenshot shows the 'Error Message' table in the iConnect system. The table has the following columns: Date, Source, Code, Error Message, Code Type, Action Code, and Action Message. There is one record displayed with the following data:

Date	Source	Code	Error Message	Code Type	Action Code	Action Message
6/13/2019 12:17:35 PM	FMMIS	L5	INVALID UNIT RATE			

Navigation controls at the bottom of the table include '<< First', '< Previous', 'Retrieve 15 Records at a time', 'Next >', and 'Last >>'.

### Do Not Correct the Rejection

1. If the WSC will not correct the rejection, then the planned service and associated auth service will be zeroed out.
2. The plan has already been validated and reviewed by the Region and/or State, the plan status is approved, and the plan is read only. The WSC will need to reverse the status of the plan before updating the service.
3. To do so, the WSC must use the WSC Cost Plan Adjustment Role.
4. Select the APD waiver Plan record with status = Approved. The Plan Information Page displays.
5. Click **File > Reverse Status**.

The screenshot shows the 'Plan Information' page in the iConnect system. The left-hand navigation menu has 'Reverse Status' highlighted. The main form area displays details for a plan, including 'APD', 'APD Waiver', 'Reed, Monica', and 'Plan Creation Date \*' set to '04/01/2018'. The top of the page shows the user 'John Sheppard' and the role 'Plans'.

6. The record is now editable, and the **Plan Status** equals Draft.

The screenshot displays the 'iConnect' interface. At the top right, it shows the user 'Violet Sheppard' and the page title 'Plan Information'. Below this, there are navigation tabs for 'File' and 'Reports'. The main content area is titled 'Plan Information' and contains a 'Plan Details' form. The form fields are as follows:

Division *	APD
Program *	APD Waiver <a href="#">Details</a>
Worker	Reed, Monica <a href="#">Clear</a> <a href="#">Details</a>
Cost Plan Creation Date *	07/01/2018
Comments	<input type="text"/>
Status *	Draft
Cost Plan Begin Date *	07/01/2018
Cost Plan End Date *	06/30/2019

7. Click **File > Save Plan**.

8. Click the **Planned Services** subpage.

9. Select the planned service that needs to be changed to open the details page. Update the following fields:

- Total No of Units = change to 0 which will change Max Amount to \$0.
- Planned Service Status = Do Not Change.

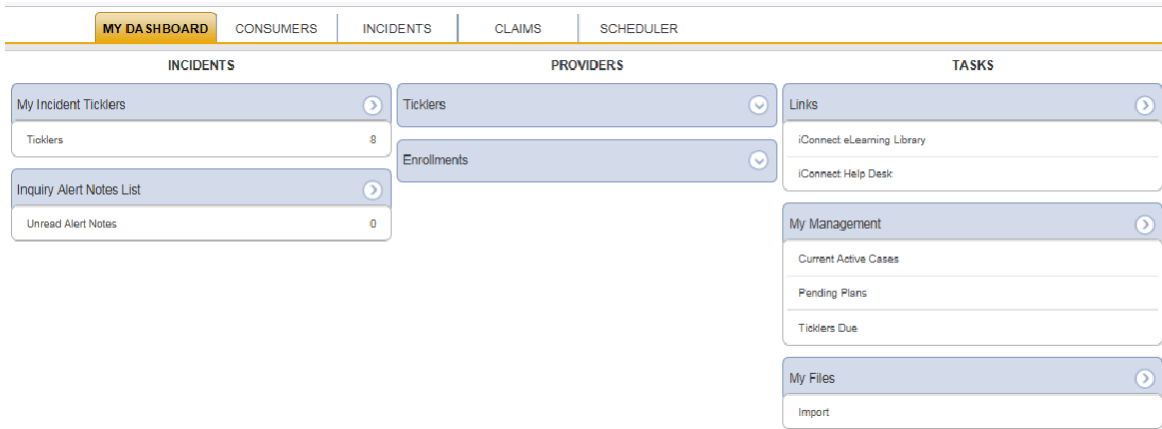
10. When finished, select **File > Save and Close Planned Service**.

11. Complete [Plan Validation](#). The edited planned service must pass plan validation.

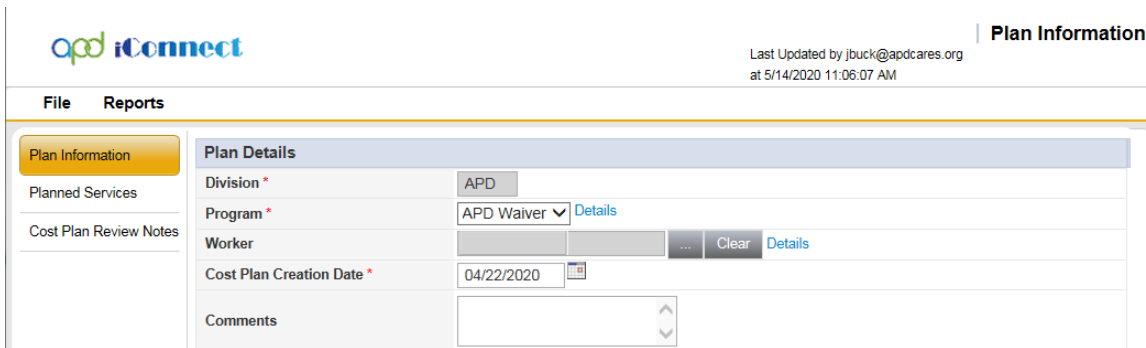
12. If the plan passes validation and does not require review, the WSC will change the Plan Status to No Review required, then save the Plan record. Skip to step 16.

13. If the plan fails validation for Region or State Office review, the review must be completed, and the plan approved. (see the [Region Review](#) or [State Office review sections](#) for more details.)

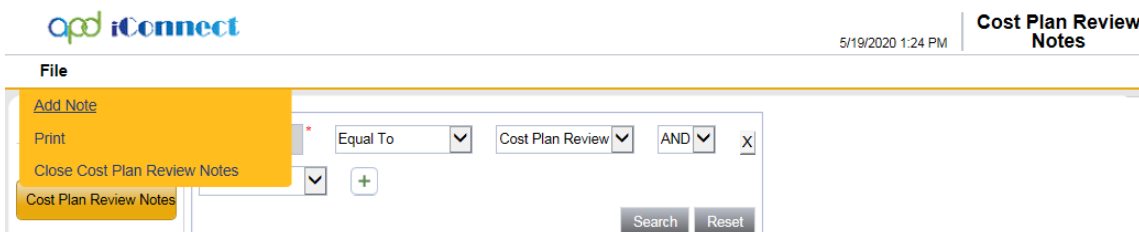
14. Then the WSC will monitor the Pending Plans queue on My Dashboard for approved plans. Navigate to **My Dashboard > Tasks > Pending Plans Queue**.



- 15. Filter the pending plans queue for those with status equal to Approved, and possibly additional date filters to display only recent plans. Select a plan to display the Plan Information page.
- 16. The WSC will add a Note assigned to the Region Worker notifying them to manually update the auth service so the dollars from the rejected authorization are credited back to the consumer’s budget.
- 17. From the plan record, the WSC will select the **Cost Plan Review Notes** subpage.



- 18. From the **File** menu, select **Add Note**.



- 19. In the new Note record, update the following fields:

- a. Division = APD
- b. Note By = defaults to self
- c. Note Date = defaults to today
- d. Cost Plan Review Note = Yes
- e. Note Type = Cost Plan Review
- f. Note Subtype = Rejected Authorization
- g. Note = Describe the request
- h. Status = Pending
- i. Route the Note to the appropriate Region Waiver Worker or Lead by clicking the **Lookup** button next to Add Note Recipient. In the pop-up window, type in the Worker's Last Name and click **Search**. In the Search results, click on the matching Worker Name to route the note to that recipient.

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

The screenshot shows the 'Notes' form in the iConnect system. The form is titled 'Notes' and has a 'File' menu and 'Tools' button. The form fields are as follows:

- Division: APD
- Note By: Buck, Jennifer
- Note Date: 05/19/2020
- Program: (empty)
- Cost Plan Review Note?: Yes
- Note Type: Cost Plan Review
- Note SubType: Rejected Authorization
- Description: (empty)
- Note: A rich text editor containing the text 'please restore this auth service'.
- Status: Pending
- Date Completed: (empty)

21. The Region staff will monitor their **My Dashboard** for new Pending Note records.

22. To do so, log into iConnect and set Role = Region Waiver Workstream Worker OR Region Waiver Workstream Lead. Click **Go**.

23. Find the consumer's Panel and click on the link for Notes with Status = Pending. Click on the **Pending** link to open the Notes Queue:

Ticklers	
Ticklers	134

Plans	
Approved	1
Draft	1
Pending	1

Appointments	
Scheduled	1

24. In the Notes Queue, open the Note record with Note Type = Cost Plan Review and Note Subtype = Rejected Authorization

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

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status	
34191		Cost Plan Review	Rejected Authorization	05/19/2020		Buck, Jennifer	Pending	<input type="checkbox"/>
59217		IFS Request		05/04/2020		Buck, Jennifer	Pending	<input type="checkbox"/>

25. Review the contents of the Note to understand the request then close the note.

26. Navigate to the consumer record and select the **Auths** tab.

27. Select the authorization and then the auth service that needs to be updated. The Auth Service Details page displays. Update the following fields:

- a. Max Units = change to zero which changes the Amount Approved to zero.
- b. Auth Service EDI = remains Rejected
- c. Auth Service Status = remains Rejected.

28. From the **File** menu, select **Save and Close**.

29. The authorization is updated manually instead of using the Update Auth functionality from the Planned Service page. This is because you do NOT want the rejected

auth service to be sent to FMMIS again. FMMIS has already rejected this auth service, the WSC chose not to correct it. The Auth statuses will remain Rejected.

30. The authorization will remain linked to the budget. When the auth service amount is updated, the application automatically updates the amount unauthorized on the consumer budget. This is when the dollars are credited back to the consumer's budget.

31. Notify the WSC the auth service has been updated by updating the Cost Plan Review note. From the Cost Plan Review Notes subpage in the plan record, select the Cost Plan Review Note with SubType = Rejected Authorization.

The screenshot shows the iConnect application interface. At the top, there is a navigation bar with the iConnect logo and a user welcome message: "Welcome, Jennifer Buck | Notes" with a timestamp "5/19/2020 1:32 PM". Below the navigation bar, there are "File" and "Tools" menus. A search filter box is visible, containing the following criteria: Status (dropdown), Equal To (dropdown), Pending (dropdown), AND (dropdown), and a red X icon. There is also an "iConnect ID" dropdown and a "+" icon. Search and Reset buttons are located below the filter box. Below the filter box, it says "2 Notes record(s) returned - now viewing 1 through 2". A table displays the following data:

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status	<input type="checkbox"/>
34191		Cost Plan Review	Rejected Authorization	05/19/2020		Buck, Jennifer	Pending	<input type="checkbox"/>
59217		IFS Request		05/04/2020		Buck, Jennifer	Pending	<input type="checkbox"/>

At the bottom of the table, there are navigation controls: "<< First", "< Previous", "Retrieve 15 Records at a time", "Next >", and "Last >>".

32. The Note Details page displays. Update the following fields.

- a. Note = describe the update that was completed and select Append Text to Note.
- b. Status = Complete
- c. Route the Note to the WSC by clicking the **Lookup** button next to Add Note Recipient. In the pop-up window, type in the Worker's Last Name and click **Search**. In the Search results, click on the matching Worker Name to route the note to that recipient.

33. From the **File** menu, select **Save and Close Note**.

The screenshot shows the 'Notes' form in the iConnect system. At the top left is the 'iConnect' logo. At the top right, it says 'Notes' and 'Last Updated by j buck@apdcares.org at 5/19/2020 1:31:56 PM'. Below the logo is a 'File Tools' menu. The form fields are as follows:

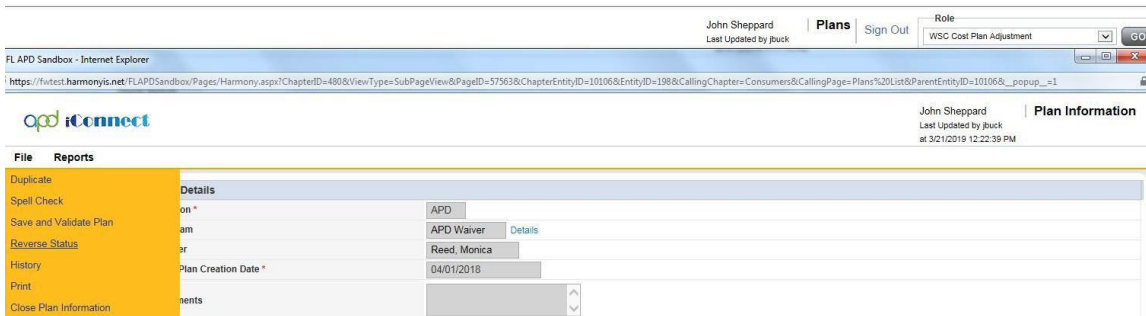
Division *	APD
Note By *	Buck, Jennifer
Note Date *	05/19/2020
Program	
Cost Plan Review Note? *	Yes
Note Type *	Cost Plan Review
Note SubType	Rejected Authorization
Description	
Note	<p>On 5/19/2020 at 1:31 PM, Jennifer Buck wrote: please restore this auth service On 5/19/2020 at 1:45 PM, Jennifer Buck wrote: I have restored this auth service.</p> <p>New Text</p> <p><b>B</b> <i>I</i> <u>U</u> 13px <b>A</b></p> <p>Append Text to Note</p>
Status *	Complete
Date Completed	05/19/2020

34. The WSC will monitor My Dashboard for incoming notes and notification the update is complete, but no further action is needed. The planned service and the auth service are both updated.

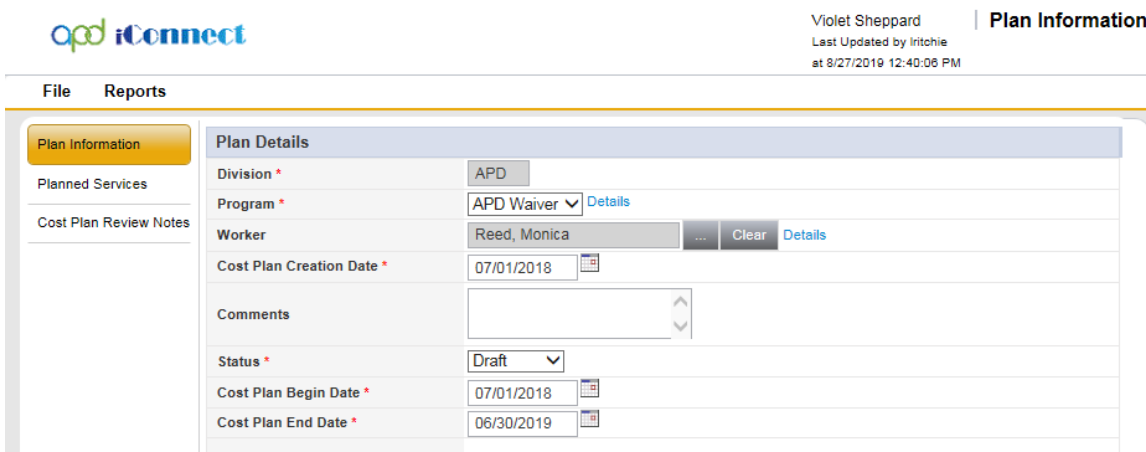
### Update the Planned Service to Correct the Rejection

1. If the planned service needs to be updated to correct the rejection, the WSC will update the planned service, the updated plan must pass validation, and then the authorization will be updated.

2. The plan has already been validated and reviewed by the Region and/or State, the plan status is approved, and the plan is read only. The WSC will need to reverse the status of the plan before updating the service.
3. To do so, the WSC must use the WSC Cost Plan Adjustment Role.
4. Select the APD waiver Plan record with status = Approved. The Plan Information Page displays.
5. Click **File > Reverse Status**.

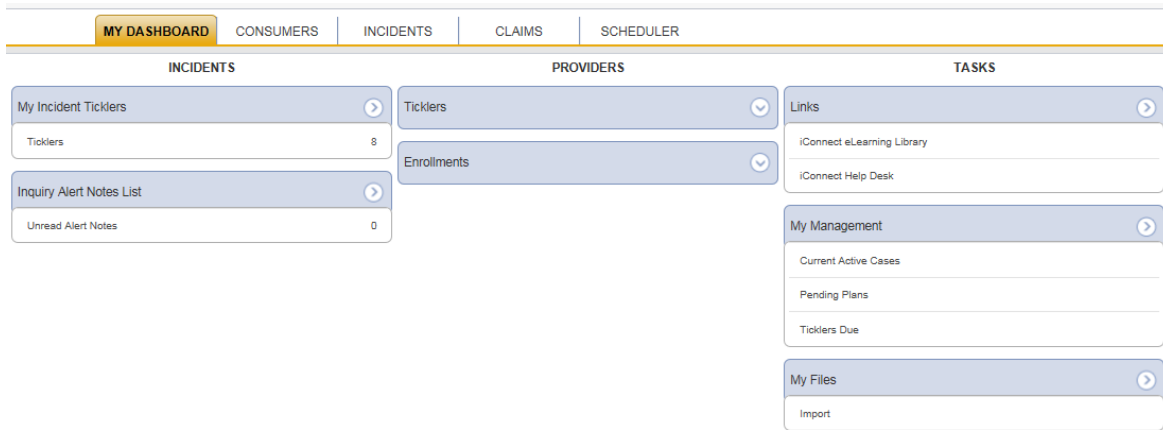


6. The record is now editable, and the **Plan Status** equals Draft.



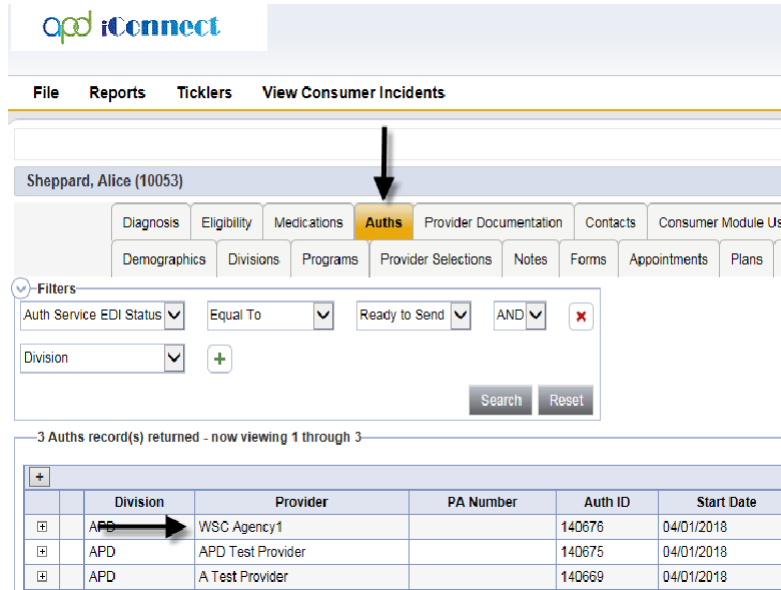
7. Click **File > Save Plan**.
8. Click the **Planned Services** subpage.
9. Select the planned service that needs to be updated to display the Planned Service Details page. Update the following fields:
  - a. This varies depending on the rejection reason
  - b. Planned Service Status = Do Not Change.

- 10. When finished, select **File > Save and Close Planned Service**.
- 11. Complete [Plan Validation](#). The edited planned service must pass plan validation.
- 12. If the plan passes validation and does not require review, the WSC will change the Plan Status to No Review required, then save the Plan record. Skip to step 16.
- 13. If the plan fails validation for Region or State Office review, the review must be completed, and the plan approved. (see the [Region Review](#) or [State Office review sections](#) for more details.)
- 14. Then the WSC will monitor the Pending Plans queue on My Dashboard for approved plans. Navigate to **My Dashboard > Tasks > Pending Plans Queue**.



- 15. Filter the pending plans queue for those with status equal to Approved, and possibly additional date filters to display only recent plans. Select a plan to display the Plan Information page.
- 16. Navigate to the Planned Services subpage.
- 17. Once the edited planned service has passed validation, the changes must also be made to the authorization using the **Update Authorization** functionality in iConnect. On the planned services details page, a message will display to the user until this update is completed.



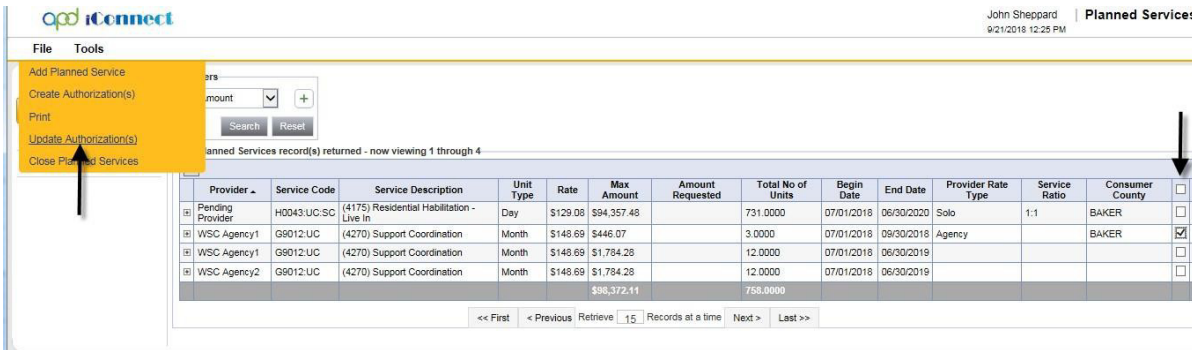


22. The Update Authorization functionality in iConnect will reset the Auth Svs EDI Status back to Ready to Send so the updates will be sent to FMMIS via the authorization interface. Proceed to [Authorization Interface section](#).

**Update the Consumer or Provider Record to Correct the Rejection (i.e. invalid Provider ID)**

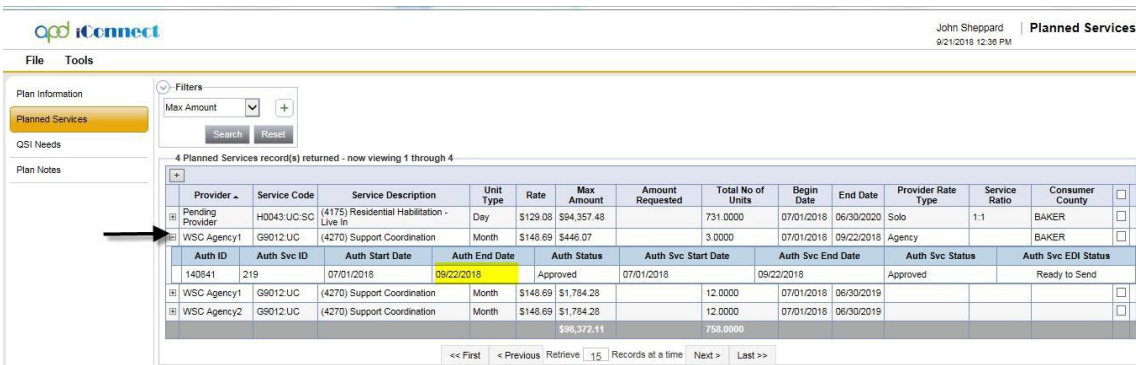
1. To correct a rejection by updating data on the consumer’s or provider’s record, the WSC will work with the appropriate parties for the corrections to be made. Once complete, the WSC will trigger the authorization to be sent back to FMMIS for approval, using the Update Auth functionality on the plan record.
2. The WSC is notified the corrections to the consumer and/or provider record have been made.
3. Navigate to the consumer record and select the Plans tab.
4. Select the approved plan to display the Plan Information page.
5. The WSC does not make any changes to the plan record.
6. Select the Planned Services subpage.
7. Click the checkbox next to the planned service that needs to be resent to FMMIS.

8. Click **File > Update Authorization**. A success notification window displays, and the authorization is updated.



9. Because no changes were made to the planned service, no changes are made to the authorization that is linked to the budget and the dollars are still deducted from the budget.

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



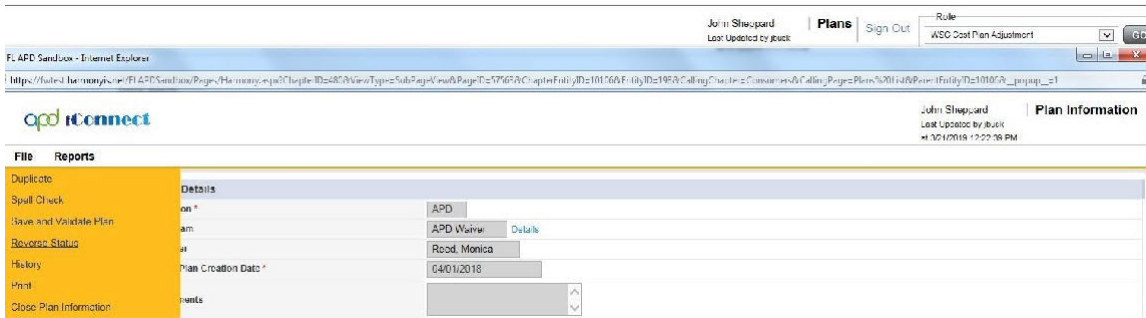
The screenshot shows the iConnect system interface. At the top, the user is identified as Alice Sheppard, with the last update by jibuck at 5/9/2018 5:22:54 PM. The main navigation bar includes 'File', 'Reports', 'Ticklers', and 'View Consumer Incidents'. Below this, the user's name 'Sheppard, Alice (10053)' is displayed. A navigation menu contains various tabs: 'Diagnosis', 'Eligibility', 'Medications', 'Auths' (highlighted with an arrow), 'Provider Documentation', 'Contacts', and 'Consumer Module User'. A secondary menu includes 'Demographics', 'Divisions', 'Programs', 'Provider Selections', 'Notes', 'Forms', 'Appointments', 'Plans', 'Pre-Enrollment', 'Payers', and 'Legal Issues'. A filter section is visible with the following criteria: 'Auth Service EDI Status' set to 'Ready to Send', 'Equal To' selected, and 'AND' logic. A 'Division' dropdown is also present. Below the filters, it states '3 Auths record(s) returned - now viewing 1 through 3'. The table below shows the following data:

	Division	Provider	PA Number	Auth ID	Start Date	End Date	Status	Cancelled
<input type="checkbox"/>	APD	WSC Agency 1		140676	04/01/2018	06/30/2018	Approved	No
<input type="checkbox"/>	APD	APD Test Provider		140675	04/01/2018	06/30/2018	Approved	No
<input type="checkbox"/>	APD	A Test Provider		140669	04/01/2018	06/30/2018	Approved	No

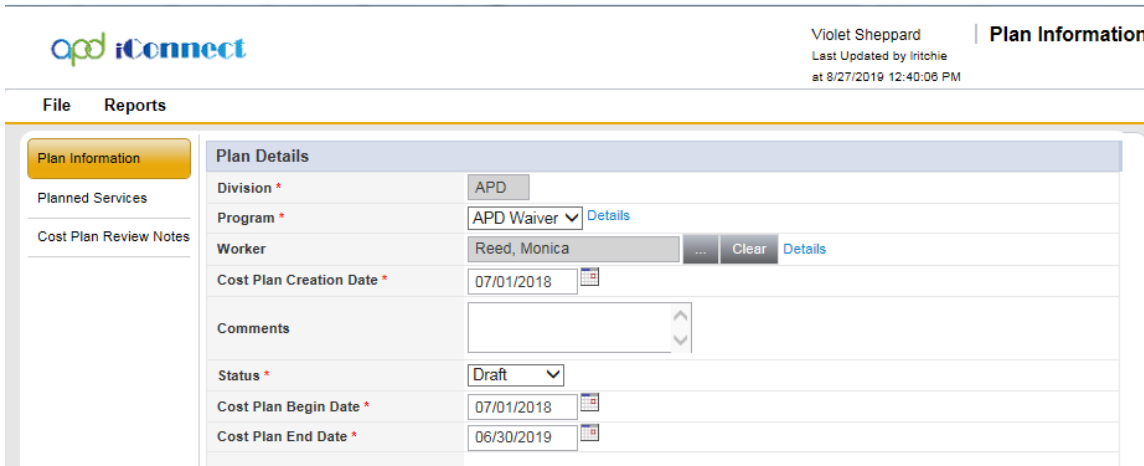
11. The Update Authorization functionality in iConnect will reset the Auth Svs EDI Status back to Ready to Send so the updates will be sent to FMMIS via the authorization interface. Proceed to [Authorization Service Approved section](#).

### Add New Service to an Approved Plan

1. To add a new service to an approved plan, the user must add a new planned service, relink the plan to the budget, and pass validation.
2. The plan has already been validated and reviewed by the Region and/or State, the plan status is approved, and the plan is read only. The WSC will need to Reverse the Status of the plan before adding a new service.
3. To do so, the WSC must use the WSC Cost Plan Adjustment Role.
4. Select the APD waiver Plan record with status = Approved. The Plan Information Page displays.
5. Click **File > Reverse Status**.



6. The record is now editable, and the **Plan Status** equals Draft.

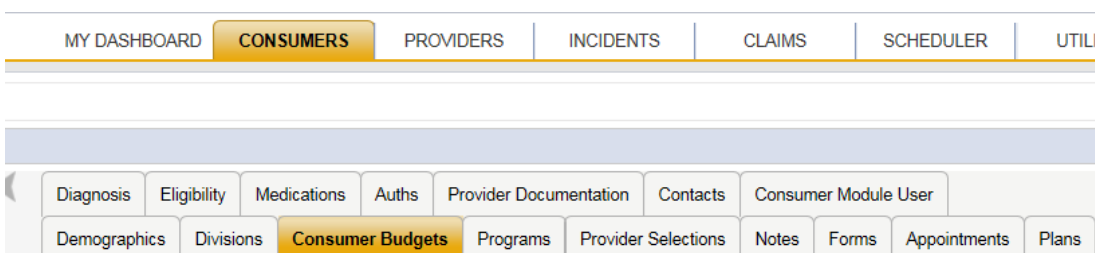


7. Click **File > Save Plan**.

8. Click the **Planned Services** subpage.

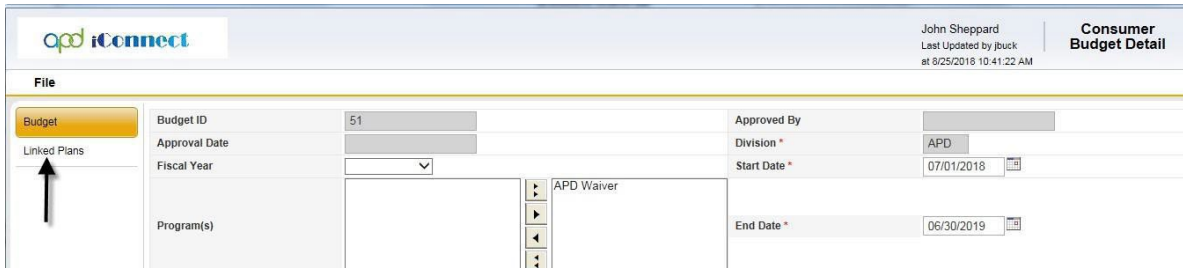
9. Proceed to [Add Planned Services section](#) to add the new service.

10. Once the planned service has been added, navigate to the Consumer Budget tab to relink the updated plan to the budget.

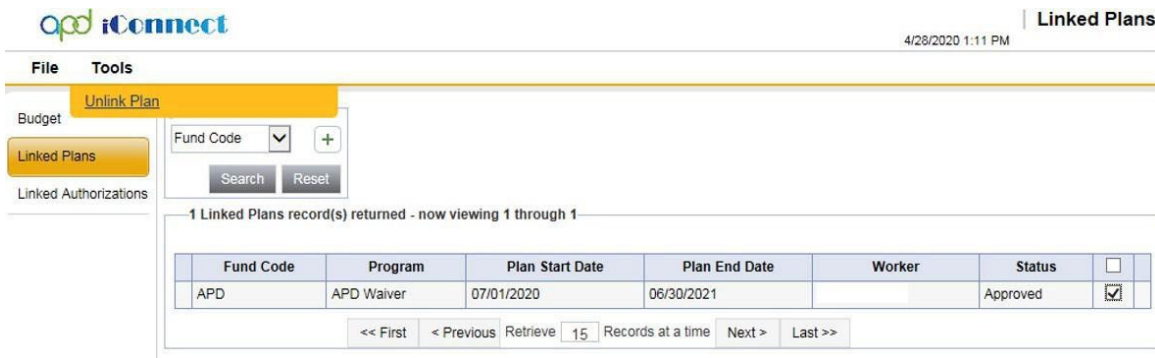


11. Select the current fiscal year's budget record. The Consumer Budget details page displays.

12. Select the **Linked Plans** subpage.

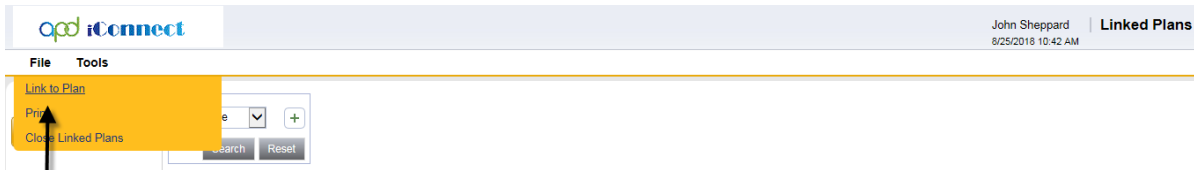


13. Select the **checkbox** next to the current fiscal year's plan. From the **Tools** menu, select **Unlink Plan**.

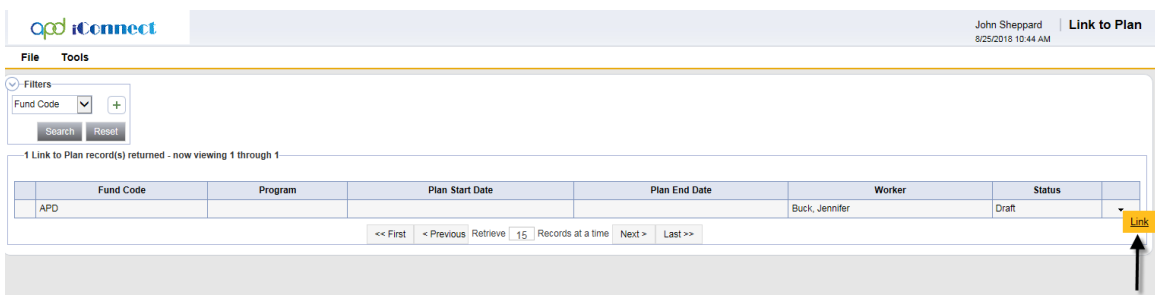


14. Unlink successful notification displays. Now, relink the plan.

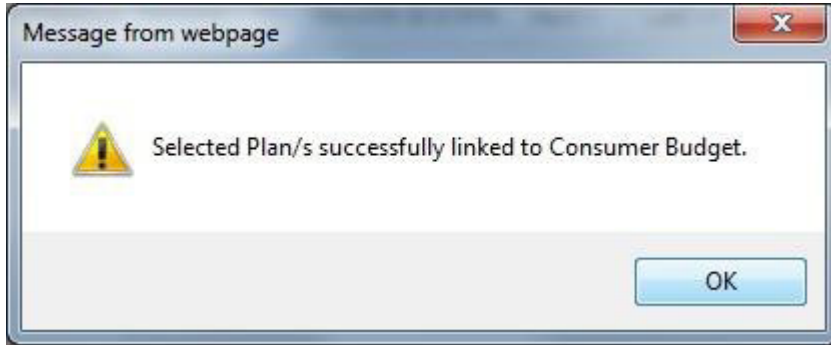
15. From the **File** menu > Select **Link to Plan**



16. A list of existing Plan records is displayed. Select the Link option from the flyout menu next to the selected Plan.



17. Link successful notification displays. Click OK. Close the Link to Plan window.



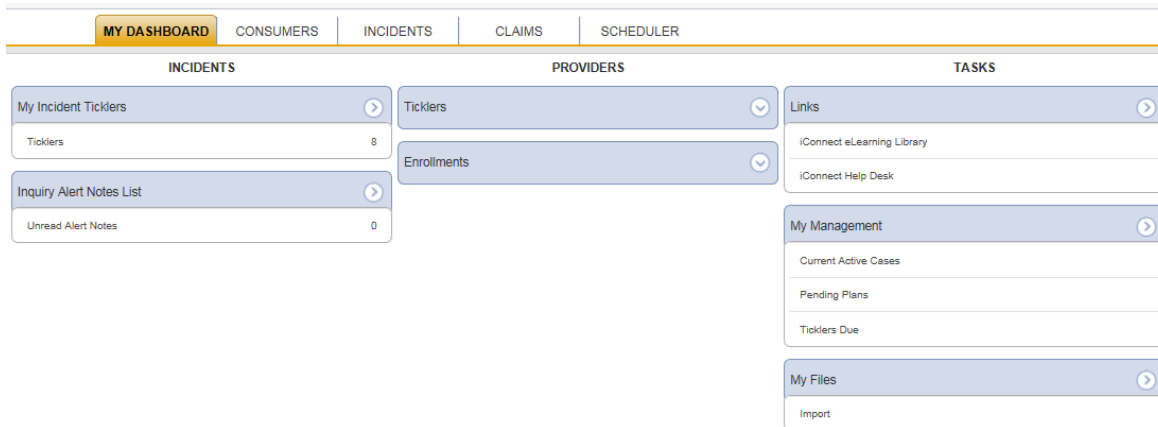
18. The Linked Plans subpage now displays the Plan record that was just re-linked.

19. Return to the plan record that includes the new service that was added. Complete [Plan Validation](#). The edited planned service must pass plan validation.

20. If the plan passes validation and does not require review, the WSC will change the Plan Status to No Review required, then save the Plan record. Skip to step 24.

21. If the plan fails validation for Region or State Office review, the review must be completed, and the plan approved. (see the [Region Review](#) or [State Office review sections](#) for more details.)

22. Then the WSC will monitor the Pending Plans queue on My Dashboard for approved plans. Navigate to **My Dashboard > Tasks > Pending Plans Queue**.

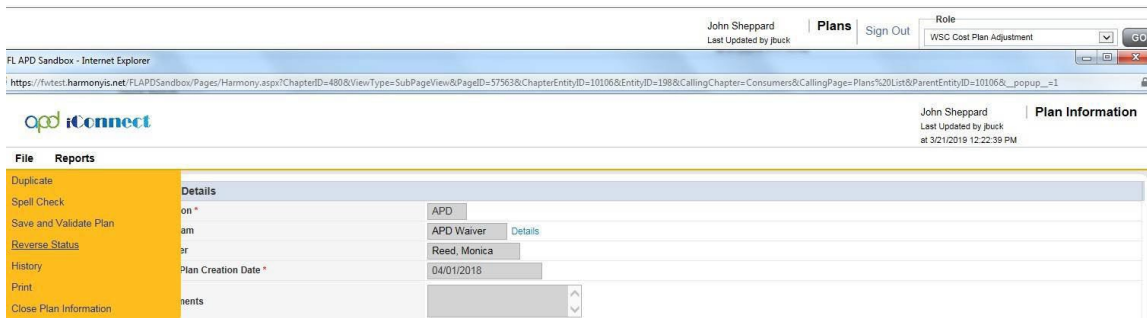


23. Filter the pending plans queue for those with status equal to Approved, and possibly additional date filters to display only recent plans. Select a plan to display the Plan Information page.

- 24. Once the plan passes validation, the WSC will create the authorization. Proceed to the [Create Authorization section](#).
- 25. The application will automatically link the new authorization to the budget.
- 26. The application will automatically include the new authorization in the next FMMIS auth interface file. Proceed to [Authorization Interface section](#).

### Update Services on an Approved Plan

- 1. To update an authorization, the user must first update the planned service, pass validation, and then update the authorization.
- 2. The plan has already been validated and reviewed by the Region and/or State, the plan status is approved, and the plan is read only. The WSC will need to Reverse the Status of the plan before adding a new service.
- 3. To do so, the WSC must use the WSC Cost Plan Adjustment Role.
- 4. Select the APD waiver Plan record with status = Approved. The Plan Information Page displays.
- 5. Click **File > Reverse Status**.



- 6. The record is now editable, and the **Plan Status** equals Draft.

Plan Information

Violet Sheppard | Plan Information  
Last Updated by Iritchie  
at 9/27/2019 12:40:06 PM

File Reports

Plan Information

Planned Services

Cost Plan Review Notes

Plan Details

Division \* APD

Program \* APD Waiver Details

Worker Reed, Monica Clear Details

Cost Plan Creation Date \* 07/01/2018

Comments

Status \* Draft

Cost Plan Begin Date \* 07/01/2018

Cost Plan End Date \* 06/30/2019

7. Click **File > Save Plan**.
8. Click the **Planned Services** subpage.
9. Proceed to [Edit Planned Services section](#) to update the service details.
10. Complete [Plan Validation](#). The edited planned service must pass plan validation.
11. If the plan passes validation and does not require review, the WSC will change the Plan Status to No Review required, then save the Plan record. Skip to step 15.
12. If the plan fails validation for Region or State Office review, the review must be completed, and the plan approved. (see the [Region Review](#) or [State Office review sections](#) for more details.)
13. Then the WSC will monitor the Pending Plans queue on My Dashboard for approved plans. Navigate to **My Dashboard > Tasks > Pending Plans Queue**.

MY DASHBOARD CONSUMERS INCIDENTS CLAIMS SCHEDULER

INCIDENTS PROVIDERS TASKS

My Incident Ticklers Ticklers 8

Inquiry Alert Notes List Unread Alert Notes 0

Ticklers Enrollments

Links iConnect eLearning Library iConnect Help Desk

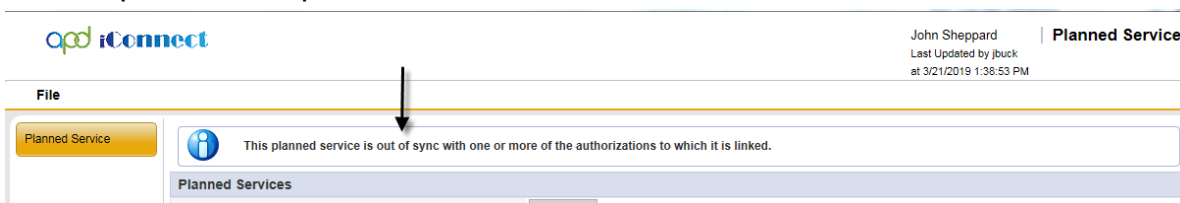
My Management Current Active Cases Pending Plans Ticklers Due

My Files Import

14. Filter the pending plans queue for those with status equal to Approved, and possibly additional date filters to display only recent plans. Select a plan to display the Plan Information page.

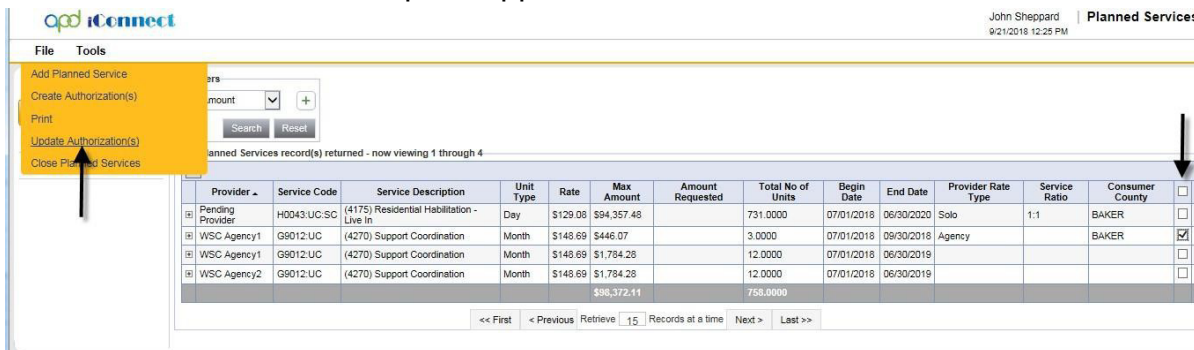
15. Navigate to the Planned Services subpage.

16. Once the edited planned service has passed validation, the changes must also be made to the authorization using the **Update Authorization** functionality in iConnect. On the planned services details page, a message will display to the user until this update is completed.



17. Click the checkbox next to the planned service that was updated.

18. Click **File > Update Authorization**. A success notification window displays, and the authorization is updated. Only after passing Plan Validation, will the Update Authorization menu option appear on the Planned Services tab.



19. The application automatically updates the authorization that is linked to the budget.

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

John Sheppard | Planned Services  
9/21/2018 12:28 PM

Plan Information  
Planned Services  
QS Needs  
Plan Notes

Filters  
Max Amount  
Search Reset

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

Provider	Service Code	Service Description	Unit Type	Rate	Vbx Amount	Amount Requested	Total No of Units	Begin Date	End Date	Provider Rate Type	Service Ratio	Consumer County
Pending Provider	H00+3.UC.3C	(4175) Residential Rehabilitation - Live In	Day	\$129.30	\$94,357.48		73.0000	07/01/2018	06/30/2020	Solo	1.1	BAKER
WSC Agency1	G90+2.UC	(4270) Support Coordination	Month	\$140.28	\$440.07		3.0000	07/01/2018	06/22/2019	Agency		BAKER
14084	219					Approved	07/01/2018	06/22/2018	Approved			Ready to Send
WSC Agency1	G90+2.UC	(4270) Support Coordination	Month	\$148.59	\$1,784.28		12.0000	07/01/2018	06/30/2019			
WSC Agency2	G90+2.UC	(4270) Support Coordination	Month	\$148.59	\$1,784.28		12.0000	07/01/2018	06/30/2019			
					498,372.44		758.0000					

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

Alice Sheppard | Auths  
Last Updated by jibuck 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 Pre-Enrollment 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

21. The Update Authorization functionality in iConnect will reset the Auth Svcs EDI Status back to Ready to Send so the updates will be sent to FMMIS via the authorization interface. Proceed to [Authorization Interface section](#).

### Cancel Auth Services

An Auth service can be cancelled only when there has been nothing billed against the consumer’s budget. The WSC will check the FMMIS portal and/or iConnect for any claims for the consumer that fall within the budget year. If none exist, in iConnect, the WSC will begin the process by ‘zeroing out’ the planned service then pushing the update to the associated authorization. The application will automatically send the cancellation request in the FMMIS interface. When the cancellation is approved, FMMIS Auth interface changes the status to Terminated and the Amount Approved for is changed to \$0.00, which is when the consumer’s budget is credited back the dollars of the cancelled auth service. When the cancellation is rejected, the FMMIS Auth interface will change the auth statuses to Rejected. The Amount Approved is not changed. Because the Amount Approved is not changed, the dollars are still deducted from the budget.

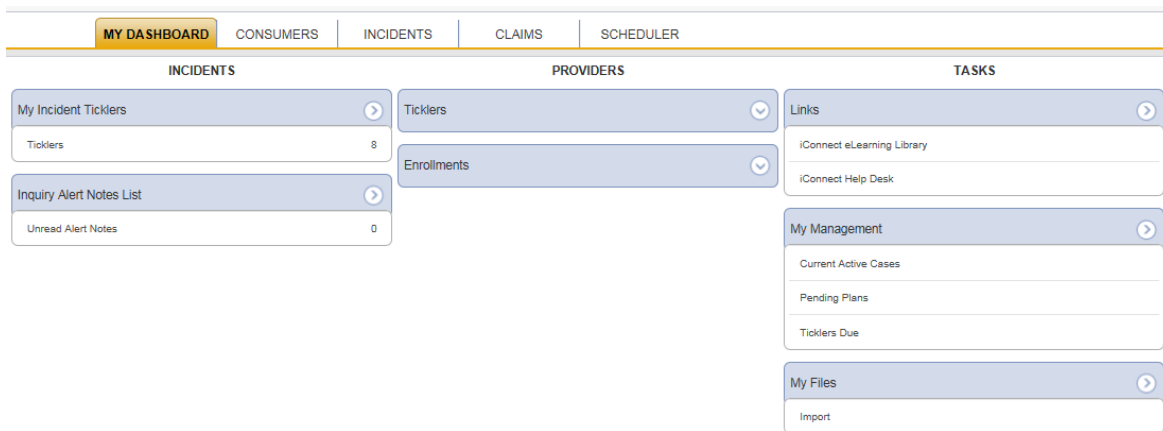
1. To request an authorization cancellation, using the **WSC Cost Plan Adjustment Role**, navigate to the Plans tab of the consumer record and open the plan with the authorization to be cancelled.
2. From the **File** menu > Select **Reverse Status**. This will make the planned service editable. The status defaults to Draft.
3. Select the **Planned Service** subpage. For each auth service you wish to cancel, select the associated planned service to display the Planned Service details page. Update the following fields:
  - a. Total Number of Units = 0 which will change Max Amount to \$0  
*Cannot change Rate to \$0 because will trigger plan validation rule*
  - b. Authorization Notes/Comments: explain why the authorization is being cancelled.
  - c. Planned Service Status = Terminated

The screenshot shows the 'Planned Service' details page in the iConnect system. The page includes a 'File' menu and a 'Planned Service' header. The main content area contains the following fields and values:

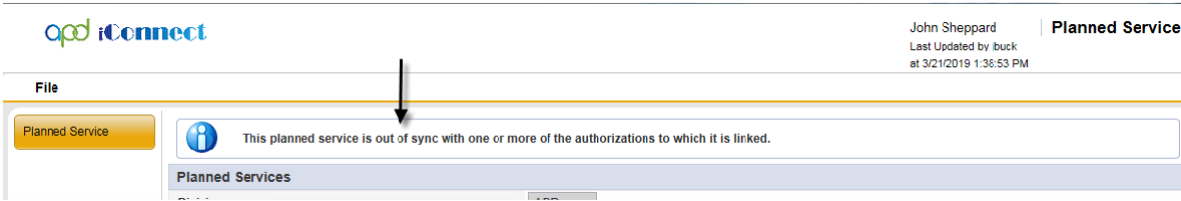
- Division: APD
- Begin Date: 07/01/2019
- Fiscal Year: 2020
- End Date: 07/01/2019
- Index/SubObject Code: Central, Central Region, Waiver, iBudget Waiver
- Service Ratio: [Dropdown]
- Consumer County: DU/VAL
- Provider Rate Type: Solo
- Service Code: 97530 LIC
- Service Description: (4110) Occupational Therapy
- Unit Type: 15 mins
- Units Per: 2.00
- Units of Measure: Business Day
- Rate: \$0.00
- Total No of Units: 2
- Max Amount: \$0.00
- Amount Requested: [Empty]
- Provider ID: 10055
- Provider: Pending Provider
- Authorization Notes/Comments: required comments from WSC on the Auth this service always requires region review
- Non-Taxable: [Unchecked]
- Planned Service Status: Terminated
- Corresponding Auth No.: 121205

4. From the **File** menu > select **Save and Close Planned Service**.
5. Complete [Plan Validation](#). The edited planned service must pass plan validation.

- 6. If the plan passes validation and does not require review, the WSC will change the Plan Status to No Review required, then save the Plan record. Skip to step 11.
- 7. If the plan fails validation for Region or State Office review, the review must be completed, and the plan approved. (see the [Region Review](#) or [State Office review sections](#) for more details.) Region or State involvement in the authorization cancellation process is recommended to verify there have been no claims billed against this authorization before sending the cancellation to FMMIS.
- 8. Following the review, the reviewer will change the status of the Terminated Planned service to Region or State Office review Approved and the Plan Status = Approved and re-validate the plan.
- 9. Then the WSC will monitor the Pending Plans queue on My Dashboard for approved plans. Navigate to **My Dashboard > Tasks > Pending Plans Queue**.



- 10. Filter the pending plans queue for those with status equal to Approved, and possibly additional date filters to display only recent plans. Select a plan to display the Plan Information page.
- 11. Navigate to the Planned Services subpage.
- 12. Once the updated plan has passed validation, the authorization needs to be updated by using the **Update Authorization** functionality in iConnect. On the planned services details page, the message below will display to the user until this update is completed.

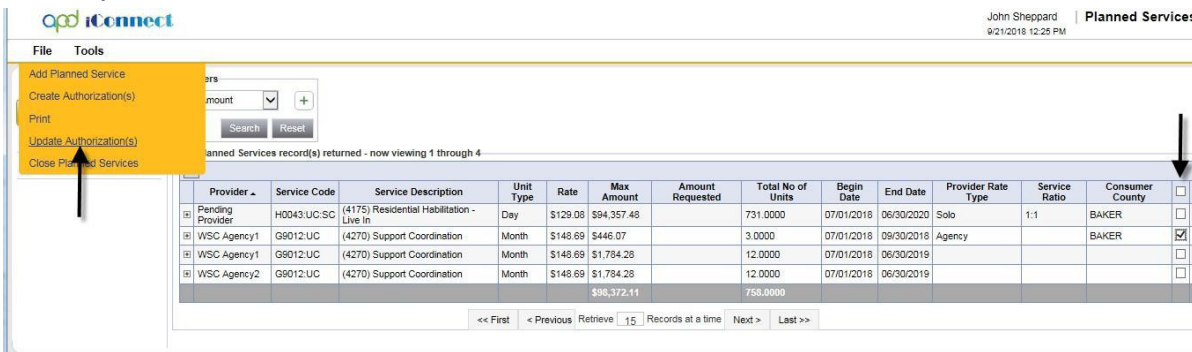


13. Navigate to the Planned Services subpage.

14. Click the checkbox next to the planned service that was updated.

15. Click **File > Update Authorization**. A success notification window displays, and the authorization is updated. Only after passing Plan Validation, will the Update Authorization menu option appear on the Planned Services tab.

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



17. The Update Authorization functionality will automatically update the following on the associated auth service:

- a. Amount Approved = No change. This will not be changed until the cancellation is approved by FMMIS.
- b. Auth Status = Terminated
- c. Auth Service Status = Terminated
- d. Auth Service EDI Status = Ready to Send.
- e. The status changes will trigger the cancellation to be sent to FMMIS.

Service Description	(4270) Support Coordination
Unit Type *	Month
Units Per	1.00
Units of Measure	Month - Round Up
Max. Units *	0
Rate *	\$148.69
Amount Approved *	\$1,784.28
Auth Service EDI Status	Ready to Send
Status	Terminated

18. Current FMMIS Auth Interface Logic will send the X transaction code to FMMIS for cancelled authorization requests. The WSC must wait approximately 24 hours until the interface has processed and FMMIS has sent a response.

### Cancellation Approved

1. When the cancellation is approved, the FMMIS Auth interface will change the authorization statuses to Terminated.

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

Demographics Divisions Consumer Budgets Programs Provider Selections SAN Notes Forms Appointments Plans Pre-Enrollment Payers

Filters  
Division

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

Division	Provider	Auth ID	Start Date	End Date	Status	Cancelled
APD		232248	07/01/2018	06/30/2019	Rejected	No
APD		185935	01/01/2019	06/30/2019	Approved	No
APD	Pending Provider	232432	06/05/2019	06/30/2019	Approved	No
APD		178648	01/01/2019	06/30/2019	Approved	No
APD	A Test Provider	232141	07/01/2018	06/30/2019	Terminated	Yes

Auth Service ID	Service Code	Service	Start Date	Unit Type	End Date	Auth Service EDI Status	Max Units	Status	Rate	Amount Approved	Cancelled	Provider Rate Type	Consumer County	Service Ratio
139768	G9012-UC	(4270) Support Coordination	07/01/2018	Month	06/30/2019	Terminated	12	Terminated	\$148.69	\$0.00	Yes	Agency	Hernando	

2. The Amount Approved for each approved cancelled auth service is also changed to \$0.00.

3. The money that was originally designated will be added back to the Amount Unauthorized.

File

Budget ID: 34757  
 Approval Date:   
 Fiscal Year: 2021  
 Program(s):  APD Waiver  
 Termination Date:   
 Allocation Algorithm Amount: \$15,000.00  
 Budget Status: Budget Appr.  
 WSC:   
 Amount Unauthorized: \$15,000.00

Approved By:   
 Division: APD  
 Start Date: 07/01/2020  
 End Date: 06/30/2021  
 Budget Type: iBudget  
 Current Budget: \$15,000.00  
 Description:   
 Regional Office Staff:   
 State Office Staff:

- The authorization remains linked to the budget, visible on the Linked Authorizations subpage.

File Tools

Budget

Linked Plans

Linked Authorizations

Filters

Fund Code

Search Reset

1 Linked Authorizations record(s) returned - now viewing 1 through 1

Fund Code	Provider	Auth ID	Start Date	End Date	Status	
APD	A Test Provider	232141	07/01/2018	06/30/2019	Terminated	<input checked="" type="checkbox"/>

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

### Cancellation Rejected

- When the cancellation is rejected, the FMMIS Auth interface will change the Auth statuses to 'Rejected' and make the record editable again.

AuthService

Last Updated by Admin at 5/14/2020 4:53:23 PM

File

AuthService

Error Message

The authorized service is out of sync with the planned service to which it is linked.

Authorized Service

PA Number 7520127403

Start Date 04/01/2020

End Date 05/15/2020

Index/SubObject	IndexCode	Index Description	SubObject	SubObject Description
	Central	Central Region	Waiver	iBudget Waiver

Service Code 92507:UC

Secondary Code 92507:UC

Service Description (4260) Speech Therapy

Unit Type 15 mins

Units Per 10.00

Units of Measure Week

Max. Units 0

Rate \$18.02

Amount Approved \$1,025.28

Auth Service EDI Status Rejected

Status Rejected

- The Amount Approved is not changed.
- Because the Amount Approved is not changed, the dollars are still deducted from the budget. The authorization remains linked to the budget.
- The next steps the WSC take depends on the reason for the rejection.

### Rejection: Paid Claims Exist

- If the cancellation was rejected because paid claims exists, the WSC will contact the provider with request to void the claims. The provider will inform the WSC after the claim has been voided.

2. The WSC will update the authorization from the plan record.
3. Using the WSC role, the WSC will navigate to the consumer record and select the Plans tab.
4. Select the approved plan. The Plan Information page displays. You do not need to reverse the status of the plan because you are not making any changes to the plan or planned services.
5. The trigger to resend the authorization to FMMIS is located on the Planned Services subpage. Select the Planned services subpage.
6. Put a **checkbox** next to the service that needs to be resent to FMMIS.
7. From the **File** menu, select **Update Auth.**

The screenshot shows the 'Planned Services' page in the iConnect system. The 'File' menu is open, and 'Update Authorization(s)' is highlighted. Below the menu, there is a search bar and a table of planned services. The table has the following data:

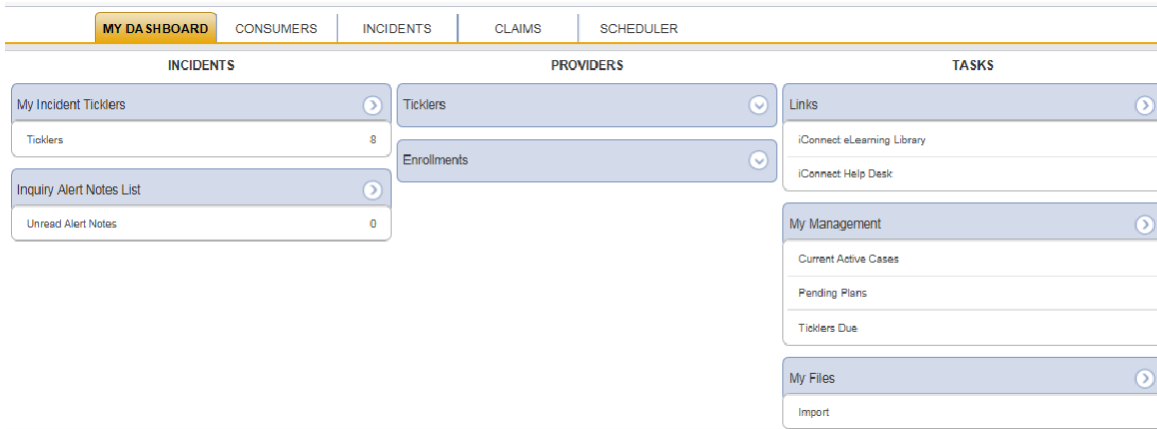
Provider	Service Code	Service Description	Unit Type	Rate	Max Amount	Total No of Units	Amount Requested	Begin Date	End Date	Provider Rate Type	Service Ratio	Consumer County	Checkbox
A Test Provider	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$1,784.28	12.0000		07/01/2020	06/30/2021	Agency		PALM BEACH	<input checked="" type="checkbox"/>
Pending Provider	S5130:UC	(4140) Personal Supports	15 mins	\$3.86	\$16,026.72	4152.0000		07/01/2020	06/30/2021	Agency	1:1	PALM BEACH	<input type="checkbox"/>
Test Providers	H2019:UC:HP	(4012) Behavior Analysis - Level 1	15 mins	\$20.71	\$7,952.64	384.0000		07/01/2020	06/30/2021	Agency		PALM BEACH	<input type="checkbox"/>
					\$25,763.64	4548.0000							

8. The success notification message displays. Click **OK**.
9. The Auth Service EDI Status changes to Ready to Send and will be included in the next FMMIS Auth interface file.
10. Proceed to [Cancellation Approved section](#).

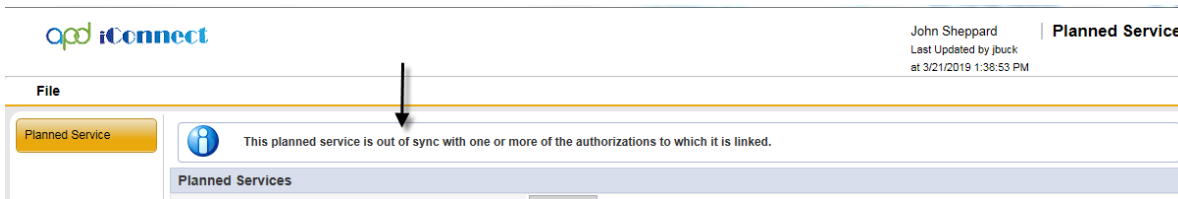
**Rejection: Invalid Begin Date**

1. If the cancellation was rejected because of an invalid begin date, the WSC will correct the rejection by updating the planned service.

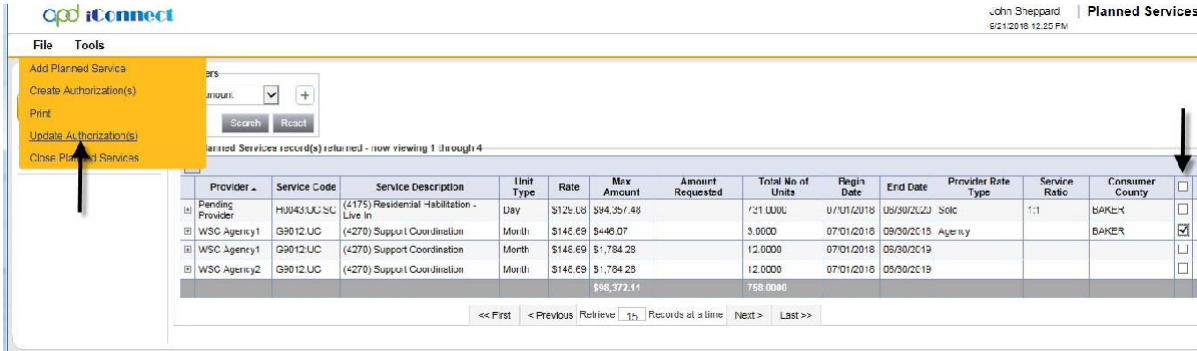
2. Using the WSC Cost Plan Adjustment role, the WSC will navigate to the consumer record and select the Plans tab.
3. Select the approved plan. The Plan Information page displays.
4. From the **File** menu, select **Reverse Status**.
5. The Plan status changes from Approved to Draft.
6. Select the Planned services subpage.
7. Select the service that needs to be updated. The Planned Services details page displays. Update the following fields:
  - a. Start Date = change the start date to a valid begin date
  - b. Planned Service Status = Do not change.
8. From the File menu, select Save and Close Planned Services.
9. Complete [Plan Validation](#). The edited planned service must pass plan validation.
10. If the plan passes validation and does not require review, the WSC will change the Plan Status to No Review required, then save the Plan record. Skip to step 26.
11. If the plan fails validation for Region or State Office review, the review must be completed, and the plan approved. (see the [Region Review](#) or [State Office review sections](#) for more details.)
12. Following the review, the reviewer will change the status of the Terminated Planned service to Region or State Office review Approved and the Plan Status = Approved and re-validate the plan.
13. Then the WSC will monitor the Pending Plans queue on My Dashboard for approved plans. Navigate to **My Dashboard > Tasks > Pending Plans Queue**.



- 14. Filter the pending plans queue for those with status equal to Approved, and possibly additional date filters to display only recent plans. Select a plan to display the Plan Information page.
- 15. Navigate to the Planned Services subpage.
- 16. Once the updated plan has passed validation, the authorization needs to be updated by using the **Update Authorization** functionality in iConnect. On the planned services details page, the message below will display to the user until this update is completed.



- 17. Navigate to the Planned Services subpage.
- 18. Click the checkbox next to the planned service that was updated.
- 19. Click **File > Update Authorization**. A success notification window displays, and the authorization is updated. Only after passing Plan Validation, will the Update Authorization menu option appear on the Planned Services tab.
- 20. The authorization details can be viewed by selecting the + next to the edited planned service or from the Authorization tab.



21. The Update Authorization functionality will automatically update the following on the associated auth service:

- a. Amount Approved = No change. This will not be changed until the cancellation is approved by FMMIS.
- b. Auth Status = Terminated
- c. Auth Service Status = Terminated
- d. Auth Service EDI Status = Ready to Send.
- e. The status changes will trigger the cancellation to be sent to FMMIS.

Service Description	(4270) Support Coordination
Unit Type *	Month
Units Per	1.00
Units of Measure	Month - Round Up
Max. Units *	0
Rate *	\$148.69
Amount Approved *	\$1,784.28
Auth Service EDI Status	Ready to Send
Status	Terminated

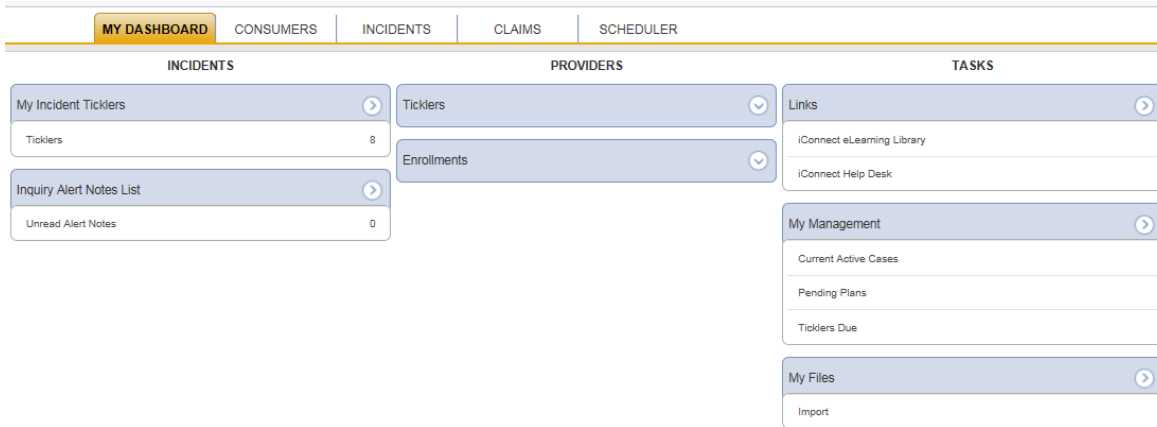
22. Current FMMIS Auth Interface Logic will send the X transaction code to FMMIS for cancelled authorization requests. The WSC must wait approximately 24 hours until the interface has processed and FMMIS has sent a response. Proceed to [Cancellation Approved section](#).

**Rejection: Cancelled in Error**

1. If the cancellation was sent in error and rejected, the WSC will return the planned service back to its original state.
2. Since the cancellation was never approved, the dollars are still deducted from the budget.

3. The WSC can see the original planned service information from the authorization service details page or the history record on the planned service page.
4. Using the WSC Cost Plan Adjustment role, the WSC will navigate to the consumer record and select the Plans tab.
5. Select the approved plan. The Plan Information page displays.
6. From the **File** menu, select **Reverse Status**.
7. The Plan status changes from Approved to Draft.
8. Select the Planned services subpage.
9. Select the service that needs to be updated. The Planned Services details page displays. Update the following fields:
  - a. Total No of Units = 0. Change back to the original number.
  - b. Max Amount = 0. Updates automatically to the original amount.
  - c. Comments = Terminated. Update to Termination sent in error.
  - d. Planned Service Status = Terminated or Region Review Approved. Change Terminated to Approved. Do not change if Status = Region Review Approved.
10. From the File menu, select Save and Close Planned Services.
11. Complete [Plan Validation](#). The edited planned service must pass plan validation.
12. If the plan passes validation and does not require review, the WSC will change the Plan Status to No Review required, then save the Plan record. Skip to step 17.
13. If the plan fails validation for Region or State Office review, the review must be completed, and the plan approved. (see the [Region Review](#) or [State Office review sections](#) for more details.)
14. Following the review, the reviewer will not need to make any changes to the Planned Service status. The reviewer will change the Plan Status = Approved and re-validate the plan.

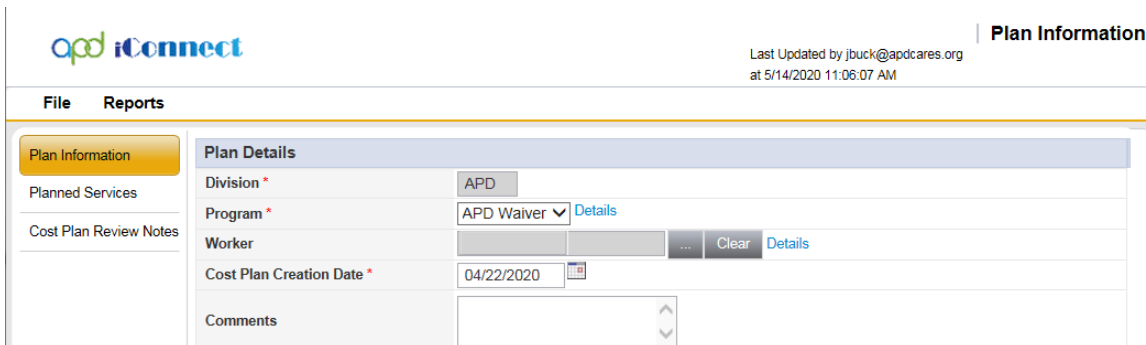
15. Then the WSC will monitor the Pending Plans queue on My Dashboard for approved plans. Navigate to **My Dashboard > Tasks > Pending Plans Queue**.



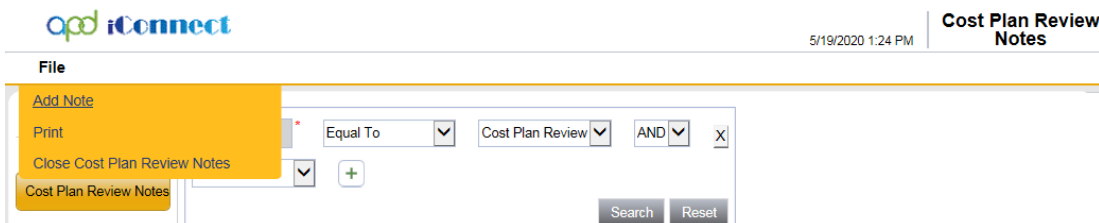
16. Filter the pending plans queue for those with status equal to Approved, and possibly additional date filters to display only recent plans. Select a plan to display the Plan Information page.

17. The WSC will add a Note assigned to the Region Worker notifying them to restore the auth service.

18. From the plan record, the WSC will select the Cost Plan Review Notes subpage.



19. From the **File** menu, select **Add Note**.



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

- a. Division = APD
- b. Note By = defaults to self
- c. Note Date = defaults to today
- d. Cost Plan Review Note = Yes
- e. Note Type = Cost Plan Review
- f. Note Subtype = Rejected Authorization
- g. Note = Describe the request
- h. Status = Pending
- i. Route the Note to the appropriate Region Waiver Worker or Lead by clicking the **Lookup** button next to Add Note Recipient. In the pop-up window, type in the Worker's Last Name and click **Search**. In the Search results, click on the matching Worker Name to route the note to that recipient.

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

The screenshot shows the 'iConnect' interface for creating a note. The form includes the following fields and values:

- Division: APD
- Note By: Buck, Jennifer
- Note Date: 05/19/2020
- Program: (empty)
- Cost Plan Review Note?: Yes
- Note Type: Cost Plan Review
- Note SubType: Rejected Authorization
- Description: (empty)
- Note: please restore this auth service
- Status: Pending
- Date Completed: (empty)

22. The Region staff will monitor their **My Dashboard** for new Pending Note records.

23. To do so, log into iConnect and set Role = Region Waiver Workstream Worker OR Region Waiver Workstream Lead. Click **Go**.

24. Find the consumer's Panel and click on the link for Notes with Status = Pending. Click on the **Pending** link to open the Notes Queue:

Ticklers	
Ticklers	134

Plans	
Approved	1
Draft	1
Pending	1

Appointments	
Scheduled	1

25. In the Notes Queue, open the Note record with Note Type = Cost Plan Review and Note Subtype = Rejected Authorization

Filters: Status: Pending, Equal To, AND

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
34191		Cost Plan Review	Rejected Authorization	05/19/2020		Buck, Jennifer	Pending
59217		IFS Request		05/04/2020		Buck, Jennifer	Pending

26. Review the contents of the Note to understand the request then close the note.

27. Navigate to the consumer record and select the **Auths** tab.

28. Select the authorization and then the auth service that needs to be updated. The Auth Service Details page displays. Update the following fields:

- a. Max Units changed from zero back to the original amount.
- b. Amount approved = no changes
- c. Auth Service Status = changed to Restored
- d. Auth Service EDI = remains Rejected. When the record is saved, this will update to Approved.

29. From the **File** menu, select **Save and Close**.

30. Notify the WSC the auth service has been updated by updating the Cost Plan Review note. From the Cost Plan Review Notes subpage in the plan record, select the Cost Plan Review Note with SubType = Rejected Authorization.

The screenshot shows the iConnect application interface. At the top, there is a navigation bar with the iConnect logo and a user welcome message: "Welcome, Jennifer Buck | Notes" with a timestamp "5/19/2020 1:32 PM". Below the navigation bar, there are "File" and "Tools" menus. A "Filters" section is visible, containing a search criteria: "Status" set to "Equal To" and "Pending", with an "AND" operator and a search button. Below the filters, it says "2 Notes record(s) returned - now viewing 1 through 2". A table displays the following data:

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status	
34191		Cost Plan Review	Rejected Authorization	05/19/2020		Buck, Jennifer	Pending	<input type="checkbox"/>
59217		IFS Request		05/04/2020		Buck, Jennifer	Pending	<input type="checkbox"/>

At the bottom of the table, there are navigation controls: "<< First", "< Previous", "Retrieve 15 Records at a time", "Next >", and "Last >>".

31. The Note Details page displays. Update the following fields.
- a. Note = describe the update that was completed and select Append Text to Note.
  - b. Status = Complete
  - c. Route the Note to the WSC by clicking the **Lookup** button next to Add Note Recipient. In the pop-up window, type in the Worker's Last Name and click **Search**. In the Search results, click on the matching Worker Name to route the note to that recipient.

32. From the **File** menu, select **Save and Close Note**.

**Notes**

Division \* APD

Note By \* Buck, Jennifer

Note Date \* 05/19/2020

Program

Cost Plan Review Note? \* Yes

Note Type \* Cost Plan Review

Note SubType Rejected Authorization

Description

On 5/19/2020 at 1:31 PM, Jennifer Buck wrote:  
please restore this auth service  
On 5/19/2020 at 1:45 PM, Jennifer Buck wrote:  
I have restored this auth service.

Note

New Text

B I U 13px A

Append Text to Note

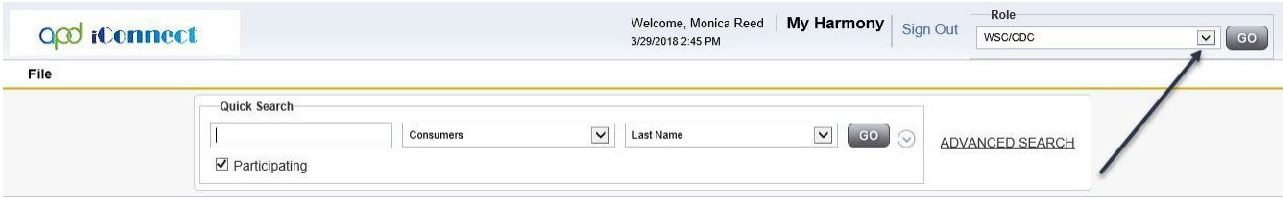
Status \* Complete

Date Completed 05/19/2020

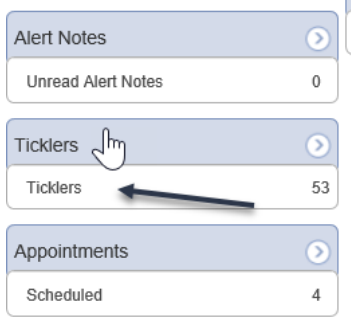
33. The WSC will monitor My Dashboard for incoming notes and notification the update is complete.

### Complete the Cost Plan

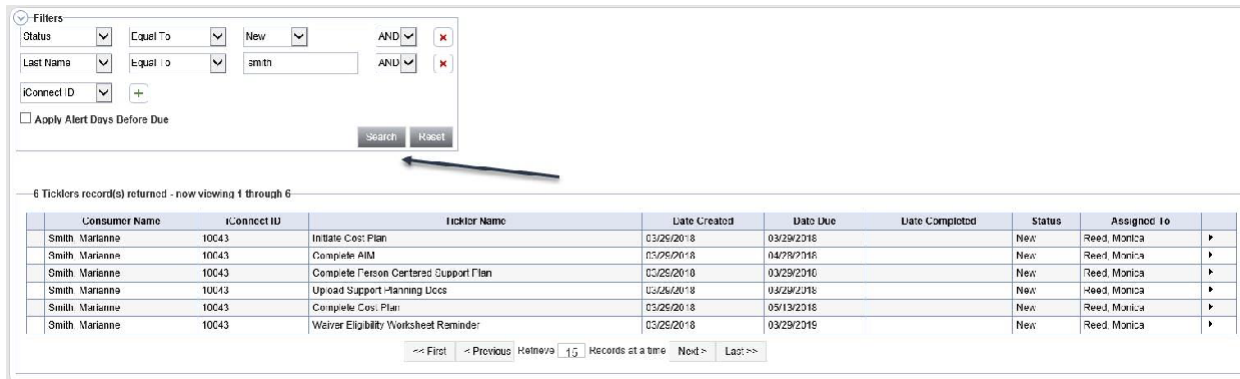
1. Upon enrolling the Consumer into the APD waiver Program (see Chapter on Standard APD Enrollment), a Workflow Wizard triggered the Initiate Cost Plan tickler, due immediately. A second tickler is also triggered to Complete the Cost Plan 45 days later.
2. To complete the Tickler, log into iConnect and set Role = WSC/CDC. Click **Go**.



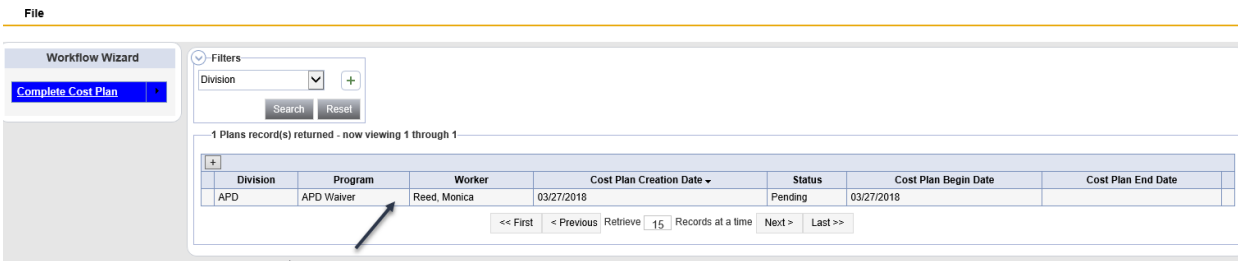
3. On the **My Dashboard**, find the Consumers section and scroll down to the Ticklers Panel. Click on **Ticklers** to open the Tickler Queue:



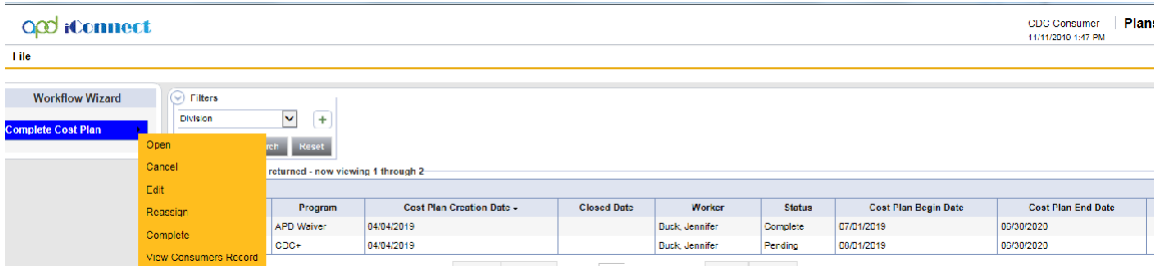
4. Use the multi variable search to narrow down the Tickler Queue. Click **Search**:



5. In the Tickler Queue, click the Tickler called Complete Cost Plan to Open it.  
 a. The consumer's Plans List View grid will open. Verify the Status of the Plan = Approved or No Review Required.



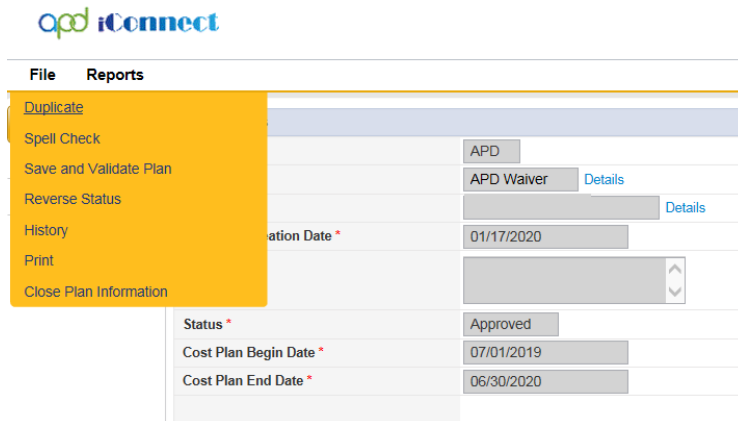
6. When finished, mark the tickler as complete. From the open tickler window, hover over the arrow next to the Tickler and click **Complete**.



### Duplicating the Cost Plan

The Waiver Support Coordinator will create a new cost plan for each consumer for each fiscal year. iConnect has a Duplicate functionality that the WSC will use.

1. Navigate to the consumer record and select the Plans tab.
2. Select the existing APD waiver plan to open it.
3. Click **File > Duplicate** to duplicate the Plan.



4. The duplicate Plan record will automatically open.
5. In the new plan, update the following fields:
  - a. Select today's date as the Cost Plan Creation Date.
  - b. Select APD waiver as the Program if the individual is enrolled on the iBudget waiver.
  - c. Select CDC+ when the consumer is enrolled in CDC+.
  - d. When the individual receives IFS-funded services, you will select Non-waiver. This will be and only when an individual has immediate health and safety needs that cannot be addressed with their waiver services, or in cases in which

individuals receive in-home subsidies, or receive monthly bus passes through IFS.

- e. Division, Worker, and status have default values that do not need to be changed.
- f. Enter the cost plan Begin and End Dates.

The screenshot shows a web application interface for 'iConnect'. At the top right, it says 'Plan Information' and 'Last Updated by j buck@apdcares.org at 3/2/2020 3:11:18 PM'. Below this is a navigation bar with 'File' and 'Reports'. The main content area is titled 'Plan Information' and contains a 'Plan Details' form. The form has several fields: 'Division \*' with a dropdown menu showing 'APD'; 'Program \*' with a dropdown menu showing 'APD Waiver' and a 'Details' link; 'Worker' with a text input 'Buck, Jennifer', a 'Clear' button, and a 'Details' link; 'Cost Plan Creation Date \*' with a date picker showing '01/17/2020'; 'Comments' with a text area; 'Status \*' with a dropdown menu showing 'Draft'; 'Cost Plan Begin Date \*' with a date picker showing '07/01/2019'; 'Cost Plan End Date \*' with a date picker showing '06/30/2020'; and 'Region or State Review' with a dropdown menu.

- 6. When finished, click **File > Save Plan**
- 7. In the new plan, click on the **Planned Services** tab, and then click into each existing Planned Service.
- 8. Update each planned service to reflect the consumers' needs for the next fiscal year.
  - a. When a consumer changes programs from iBudget to CDC or CDC to iBudget, the WSC must end all planned services using the date directly prior to the new program enrollment date and reduce total number of units accordingly.
  - b. The WSC would then create new planned services for the remainder of the fiscal year; select correct provider for iBudget or generic CDC provider for consumers enrolling on CDC and enter the prorated number of units needed for the remainder of the fiscal year.
  - c. Consumers who are enrolling on CDC must create planned service screens and cannot leave the funds as unencumbered for the monthly budget to be accurately calculated.
- 9. When finished, click **File > Save Planned Service**.
- 10. Proceed to [Plan Validation](#).