

## Chapter 14 | WSC Reassignment

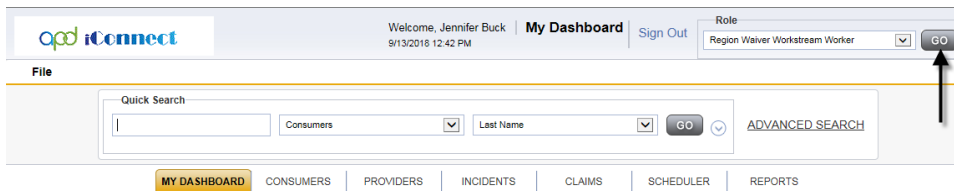
### Introduction

In some instances, a change in the assigned Waiver Support Coordinator is warranted. These instances can be initiated by the Consumer, the WSC, or circumstances that generated a need for the change. This Chapter outlines the required steps to reassign WSCs for an individual Consumer or a group of Consumers.

### Reassignment Notification

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

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

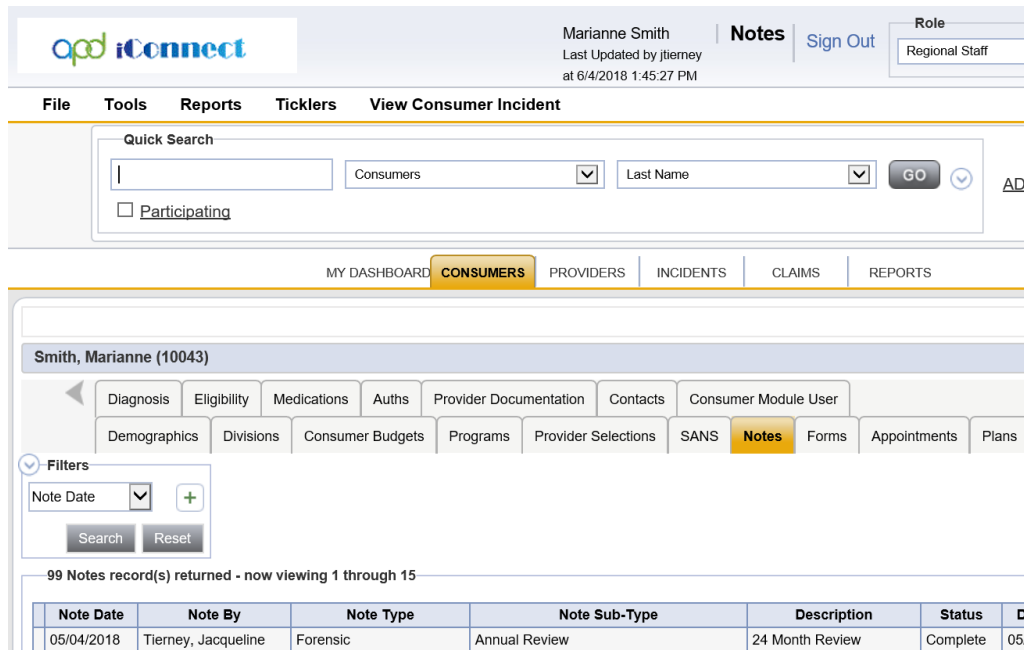


Quick Search

Consumers Last Name GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER REPORTS

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



Quick Search

Participating

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS REPORTS

Smith, Marianne (10043)

Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Module User

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

Filters

Note Date +

Search Reset

99 Notes record(s) returned - now viewing 1 through 15

Note Date	Note By	Note Type	Note Sub-Type	Description	Status	D
05/04/2018	Tierney, Jacqueline	Forensic	Annual Review	24 Month Review	Complete	05/

3. The Note Details page is displayed. Update the following fields:
  - a. Division = APD
  - b. Note Type = WSC Change Request  
NOTE: WSC and Service Providers cannot see this Note Type
  - c. Note Subtype = Consumer Requested Selection Form Sent
  - d. Note recipient = click the **ellipsis** to search for and select Waiver Workstream Lead worker record.
  - e. Status = Complete
  - f. Attach all supporting documentation

The screenshot shows the 'Notes Details' page in the iConnect system. The page header includes the 'iConnect' logo, the user name 'Alice Sheppard', and the date '5/4/2018 12:28 PM'. The main content area is a form with the following fields and values:

Field	Value
Division *	APD
Note By *	Buck, Jennifer
Note Date *	05/04/2018
Program/Provider	
Note Type *	WSC Change Request
Note Sub-Type	Consumer Requested Selection Form Sent
Description	
Note	sent the form to the consumer
Status *	Complete
Date Completed	05/04/2018

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

5. The WSC Selection Form and other supporting documents will be printed and mailed to the Consumer.

### WSC Selection – New Agency/Provider

The Consumer notifies the local regional office of his/her newly selected Waiver Support Coordinator agency or solo provider. Upon receiving the notification, the Region Staff will add a Note in iConnect to begin the reassignment process.

## New WSC Selected - Add a Note

1. To begin, log into iConnect and set Role = Region Waiver Workstream Worker or Lead. Click **Go**.
2. Navigate to the Consumers record and click the **Notes** tab > click **File** > **Add Notes**.

The screenshot displays the iConnect web application interface. At the top, the user is identified as Marianne Smith, with the role of Regional Staff. The main navigation bar includes 'File', 'Tools', 'Reports', 'Ticklers', and 'View Consumer Incident'. A search bar is present with a 'GO' button. Below the navigation, a breadcrumb trail shows 'MY DASHBOARD > CONSUMERS > PROVIDERS > INCIDENTS > CLAIMS > REPORTS'. The main content area shows the profile for 'Smith, Marianne (10043)' with various tabs like 'Diagnosis', 'Eligibility', 'Medications', etc. The 'Notes' tab is selected. A filter section for 'Note Date' is visible. Below the filters, a table lists notes, with one entry shown: a note dated 05/04/2018 by Tierney, Jacqueline, of type 'Forensic', sub-type 'Annual Review', description '24 Month Review', status 'Complete', and date '05/04'.

Note Date	Note By	Note Type	Note Sub-Type	Description	Status	Date
05/04/2018	Tierney, Jacqueline	Forensic	Annual Review	24 Month Review	Complete	05/04

3. The Note Details page is displayed. Update the following fields:
  - a. Division = APD
  - b. Note Type = WSC Selection
  - c. Note Subtype = WSC Transfer – Agency
  - d. Status = Complete
  - e. Attach all supporting documentation

Notes Details

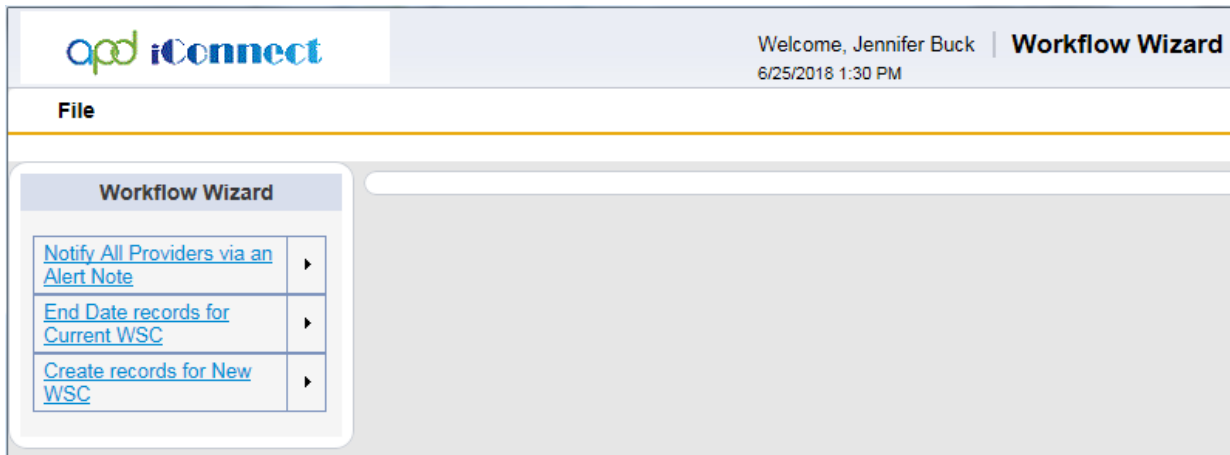
Division *	APD ▼
Note By *	Buck, Jennifer ▼
Note Date *	05/04/2018
Program/Provider	▼
Note Type *	WSC Selection ▼*
Note Sub-Type	WSC Transfer - Agency ▼
Description	▼
Note	Consumer requested to change WSC agencies
Status *	Complete ▼
Date Completed	05/04/2018

4. Click **File > Save and Close Notes**.
5. Upon saving the Note, a Workflow Wizard will trigger with the following Ticklers for the User.
  - a. Notify all Providers via an Alert Note
  - b. End date records for current WSC
  - c. Create records for New WSC
6. The actions to take for each are listed in the following sections.

## Notify All Providers via an Alert Note

The Consumer has notified the local regional office of his/her newly selected Waiver Support Coordinator and the Region Waiver Workstream Lead has created a Note in the section above to begin the reassignment process. This note triggers a Workflow Wizard with a tickler to Notify All Providers via and Alert Note.

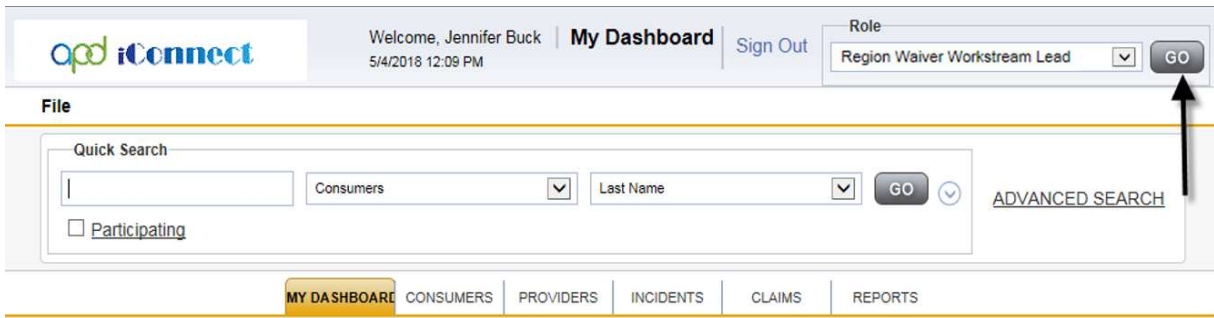
1. To begin, the user would have just saved the WSC Selection Note and triggered the Workflow Wizard. The ticklers are displayed in a new window. Click the tickler to Open it.



The screenshot shows the iConnect Workflow Wizard interface. The top navigation bar includes the iConnect logo, the user name "Welcome, Jennifer Buck", the date "6/25/2018 1:30 PM", and the title "Workflow Wizard". Below the navigation bar is a "File" section. The main content area is titled "Workflow Wizard" and contains a list of three ticklers, each with a right-pointing arrow:

- [Notify All Providers via an Alert Note](#)
- [End Date records for Current WSC](#)
- [Create records for New WSC](#)

2. The ticklers are also visible via My Dashboard at any time. To begin log into iConnect and set Role = Region Waiver Workstream Lead. Click **Go**.



The screenshot shows the iConnect My Dashboard interface. The top navigation bar includes the iConnect logo, the user name "Welcome, Jennifer Buck", the date "5/4/2018 12:09 PM", the title "My Dashboard", and a "Sign Out" link. On the right side, there is a "Role" dropdown menu set to "Region Waiver Workstream Lead" and a "GO" button. Below the navigation bar is a "File" section. The main content area is titled "Quick Search" and contains a search form with a text input field, a "Consumers" dropdown menu, a "Last Name" dropdown menu, a "GO" button, and a "Participating" checkbox. To the right of the search form is a link for "ADVANCED SEARCH". At the bottom of the dashboard, there is a navigation bar with tabs for "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", and "REPORTS". An arrow points to the "GO" button in the Role dropdown menu.

3. Navigate to the My Dashboard and find the Consumers section. Scroll down to the Ticklers panel and click into the linked number of outstanding Ticklers to access the Tickler Queue.

opd iConnect | Welcome, Jennifer Buck | My Dashboard | Sign Out | Role: Region Waiver Workstream Lead

5/4/2018 2:11 PM

File

Quick Search: [Text Box] Consumers [Dropdown] Last Name [Dropdown] GO [Button] ADVANCED SEARCH [Link]

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

CONSUMERS | INCIDENTS | PROVIDERS | TASKS

Division [Dropdown] | Disposition [Dropdown] | Notes [Dropdown] | My Management [Dropdown]

My Enrollments [Dropdown] | Screening Priority [Dropdown] | Referrals [Dropdown]

Provider Selections [Dropdown] | Status [Dropdown]

Notes [Dropdown] | My Incident Queue [Dropdown]

Alert Notes [Dropdown] | My Incident Ticklers [Dropdown]

Ticklers [Dropdown] | Alert Notes [Dropdown]

Ticklers [Text] → 88

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

opd iConnect | Welcome, Jennifer Buck | Ticklers

5/4/2018 2:17 PM

File

Filters

Status [Dropdown] Equal To [Dropdown] New [Dropdown] AND [Dropdown] [X]

Last Name [Dropdown] Contains [Dropdown] sheppard [Text] AND [Dropdown] [X]

iConnect ID [Dropdown] + [Text]

Apply Alert Days Before Due

Search [Button] Reset [Button]

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

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



**Tip**

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

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

6. Update the following fields:
  - a. Division = APD
  - b. Note Type = WSC Selection
  - c. Note Subtype = Notification of WSC Change
  - d. Note = Add the message you want the providers to see each time they login into the account.
  - e. Status = Alert

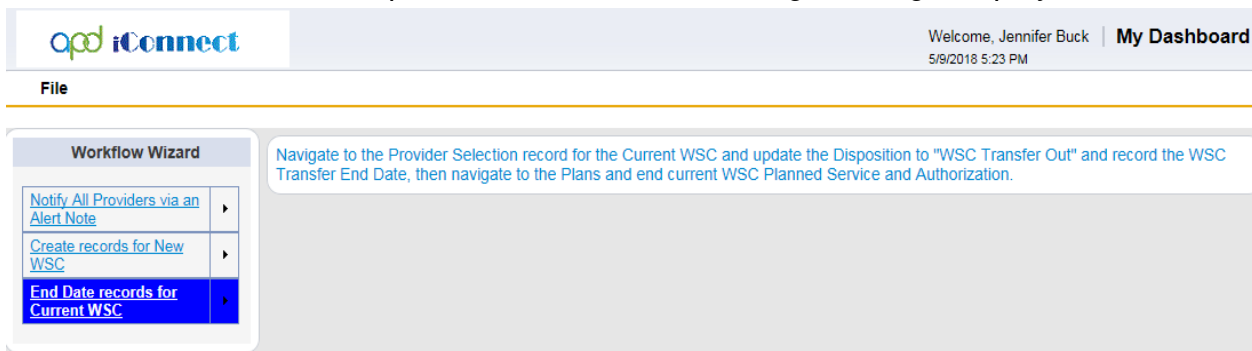
7. Click **File > Save Notes**. The Tickler is marked as complete.

### End Date Records for Current WSC

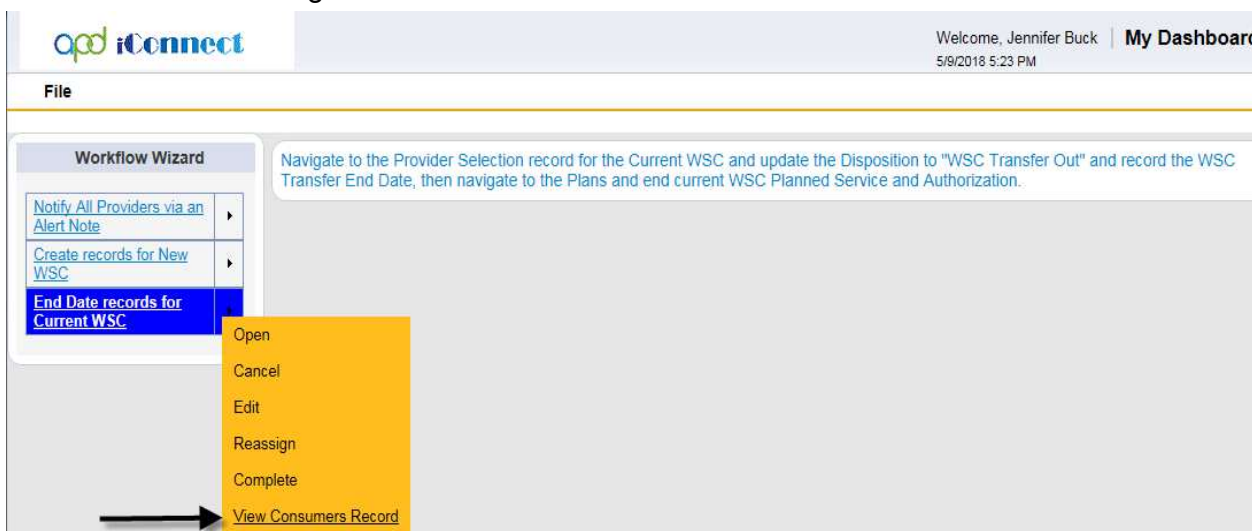
1. Return to the Workflow Wizard and find the Tickler called **End Date Records for Current WSC** tickler.

2. If the person receiving the tickler is not the Waiver Liaison assigned to the current WSC, hover over the arrow next to the Tickler to click **Reassign** to reassign it to the correct person.

3. Otherwise, click to open the Tickler. The following message displays:



4. Users can click the **View Consumer Record** option from the tickler flyout menu to navigate quickly to the Consumer record from the tickler or can complete a quick Search to navigate to the consumer's record.



5. Click the **Provider Selection** tab. From the list view grid, select the applicable WSC Provider Agency record. The provider detail page displays.

6. Update the following fields:

- a. Disposition = WSC Transfer Out
- b. Disposition Date = enter date the Disposition was changed
- c. WSC Transfer End Date = enter the end date (last day of the month)

<b>Provider</b>	Division *	APD
Provider Workers	Selected By	Buck, Jennifer ... Clear Details
Beds	Selection Date	04/30/2018
Events	Provider *	WSC Agency1 Details
Track Disposition	Referral Type *	Waiver Support Coordinator *
	Disposition *	WSC Transfer Out
	Disposition Date	04/30/2018
	WSC Transfer Effective Date	
	WSC Transfer End Date	05/31/2018
	Comments	

7. Click **File > Save and Close Provider**

8. Continue with the second part of the message tickler, to end date the Current WSC Planned Service and Authorization.

9. Click the **Plan** tab. Select the APD waiver Plan to open the Plan Details page. Click the **Planned Services** subpage.

Plan Information

**Planned Services**

QSI Needs

Plan Notes

Filters

Max Amount

Search Reset

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

Provider	Service Code	Service Description	Total No of Units	Unit Type	Rate	Max Amount	Begin Date	End Date	Auth ID	
	4250	Specialized Mental Health Counseling Assessment	1.0000	Units	\$128.21	\$128.21	04/01/2018	06/30/2018		<input 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"/>
Generic CDC+ Provider	4446	Consumable Medical Supplies (non-CDC)	36.0000	Item	\$2.00	\$72.00	04/01/2018	04/09/2018		<input type="checkbox"/>
Generic CDC+ Provider	4400	Consultant - CDC	3.0000	Month	\$148.69	\$446.07	04/02/2018	06/30/2018		<input type="checkbox"/>
WSC Agency1	4270	Support Coordination	6.0000	Month	\$148.69	\$892.14	01/01/2018	06/30/2018		<input type="checkbox"/>
			306.0000			\$4,024.02				

10. Select the Support Coordination planned service to open the details page.

11. Change the End Date. The page refreshes and the totals update.

File

**Planned Services**

Division: APD

Begin Date: 01/01/2019

End Date: 05/30/2019

IndexCode	Index Description	SubObject	SubObject Description
Statewide	Statewide	Waiver	iBudget Waiver

Service Ratio: [v]

Consumer County: ALACHUA

Provider Rate Type: Agency [v]

Service Code: G9012:UC [v]

Service Description: (4270) Support Coordination

Unit Type: Month

Units Per: 1

Units of Measure: Month - Round Up [v]

Rate: \$148.69

Total No of Units: 5

Max Amount: \$743.45

Amount Requested: [ ]

Provider ID: 10035 [v] [Details](#)

Provider: WSC Agency1

Comments: planned service comments go here [v]

Contract Number: [ ]

Planned Service Status: Approved [v]

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

13. A notification displays for the user that the planned service is out of sync with the authorization. The changes to the planned service must also be made to the authorization.

File

Planned Service

This planned service is out of sync with one or more of the authorizations to which it is linked.

**Planned Services**

Division: APD

Begin Date: 07/01/2018

End Date: 09/22/2018

IndexCode	Index Description	SubObject	SubObject Description
SunCoast	SunCoast Region	Waiver	iBudget Waiver

Service Ratio: [v]

Consumer County \*: BAKER

Provider Rate Type \*: Agency [v]

Service Code \*: G9012:UC

Service Description: (4270) Support Coordination

Unit Type: Month

Units Per \*: 1.00

Units of Measure \*: Month - Round Up [v]

Rate \*: \$148.69

Total No of Units: 3.0000

Max Amount: \$446.07

Amount Requested: [ ]

Corresponding Auth No.: 219

Provider ID: 10035 [Details](#)

Provider: WSC Agency1

Comments \*: planned service comments [v]

Contract Number: [ ]

Planned Service Status: Approved [v]

14. To do so, select the Planned Services subpage.

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

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

opd iConnect

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

File Tools

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

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

Provider	Service Code	Service Description	Unit Type	Rate	Max Amount	Amount Requested	Total No of Units	Begin Date	End Date	Provider Rate Type	Service Ratio	Consumer County	<input type="checkbox"/>
Pending Provider	H0043:UC:SC	(4175) Residential Habilitation - Live In	Day	\$129.08	\$94,357.48		731.0000	07/01/2018	06/30/2020	Solo	1:1	BAKER	<input type="checkbox"/>
WSC Agency1	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$446.07		3.0000	07/01/2018	09/30/2018	Agency		BAKER	<input checked="" type="checkbox"/>
WSC Agency1	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$1,784.28		12.0000	07/01/2018	06/30/2019				<input type="checkbox"/>
WSC Agency2	G9012:UC	(4270) Support Coordination	Month	\$148.69	\$1,784.28		12.0000	07/01/2018	06/30/2019				<input type="checkbox"/>
				\$38,372.11			758.0000						

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

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

John Sheppard  
9/21/2018 12:38 PM

File Tools

Plan Information  
Planned Services  
QSI 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	Max Amount	Amount Requested	Total No of Units	Begin Date	End Date	Provider Rate Type	Service Ratio	Consumer County
Pending Provider	H0043 UC-SC	(4175) Residential Habilitation - Live In	Day	\$129.08	\$94,357.48		731.0000	07/01/2018	06/30/2020	Solo	1.1	BAKER
WSC Agency1	G9012 UC	(4270) Support Coordination	Month	\$148.69	\$446.07		3.0000	07/01/2018	09/22/2018	Agency		BAKER
140841	219					Approved	07/01/2018	09/22/2018	Approved			Ready to Send
WSC Agency1	G9012 UC	(4270) Support Coordination	Month	\$148.69	\$1,784.28		12.0000	07/01/2018	06/30/2019			
WSC Agency2	G9012 UC	(4270) Support Coordination	Month	\$148.69	\$1,784.28		12.0000	07/01/2018	06/30/2019			
					\$36,372.11		750.0000					

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

Alice Sheppard  
Last Updated by jbuok  
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

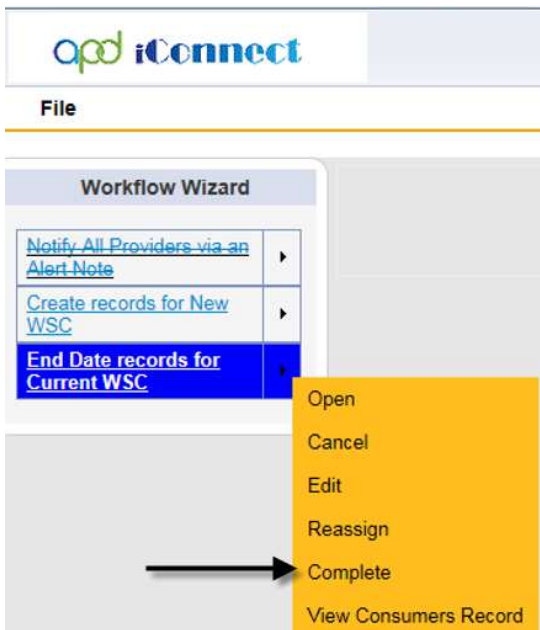
Filters  
Auth Service EDI Status Equal To Ready to Send AND  
Division

Search Reset

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

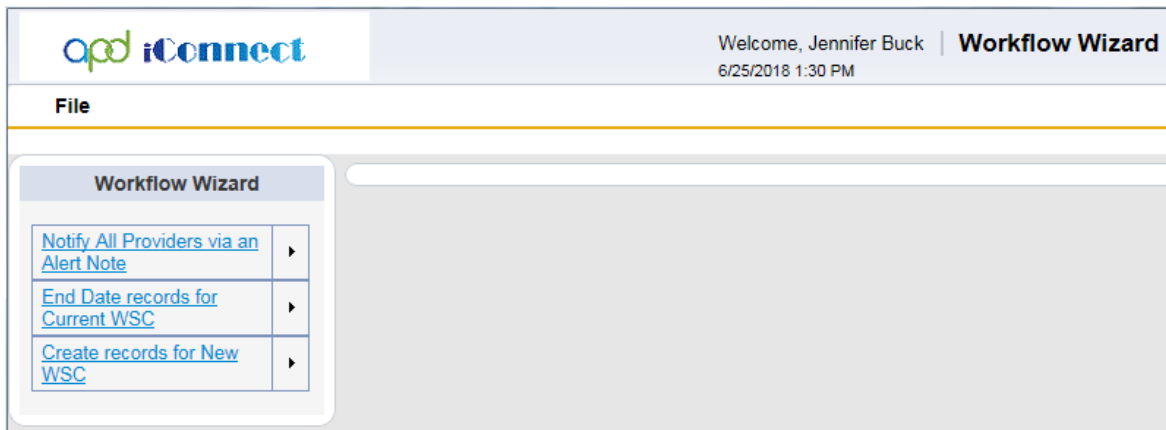
Division	Provider	PA Number	Auth ID	Start Date	End Date	Status	Cancelled
APD	WSC Agency1		140676	04/01/2018	06/30/2018	Approved	No
APD	APD Test Provider		140675	04/01/2018	06/30/2018	Approved	No
APD	A Test Provider		140669	04/01/2018	06/30/2018	Approved	No

18. Upon completing the tasks outlined in the message tickler, navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.

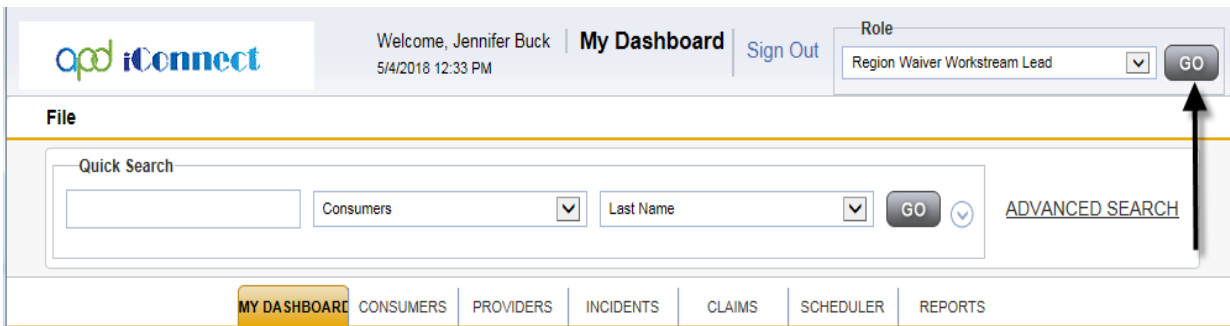


### Create Records for New WSC

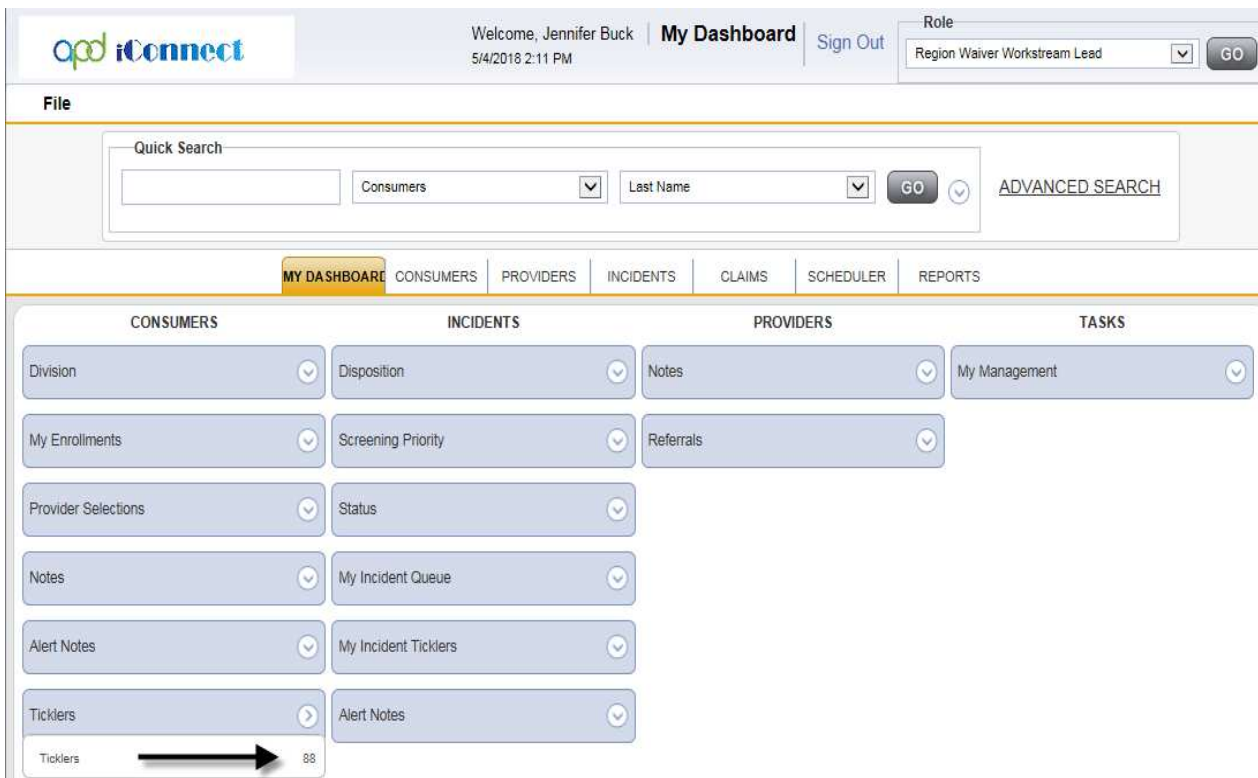
1. To begin, the user would have just saved the WSC Selection Note and triggered the Workflow Wizard. The user will be prompted to create new Provider Selection records for the new WSC and later change the Primary Worker to the new WSC (real time.) The user will also be prompted to end date the Provider Selection Record and Authorization for the current WSC and later close the current WSC Provider Record (real time.)
2. The ticklers are displayed in a new window. Click the tickler to Open it.



3. The ticklers are also visible via My Dashboard at any time. To begin log into iConnect and set Role = Region Waiver Workstream Lead. Click **Go**.



- Navigate to the My Dashboard and find the Consumers section. Scroll down to the Ticklers panel and click into the linked number of outstanding Ticklers to access the Tickler Queue.



- From here, use the multi variable search to find the Tickler. Click **Search**

File

Filters

Status  Equal To  New  AND

Last Name  Contains  sheppard AND

iConnect ID  +

Apply Alert Days Before Due

Search Reset

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

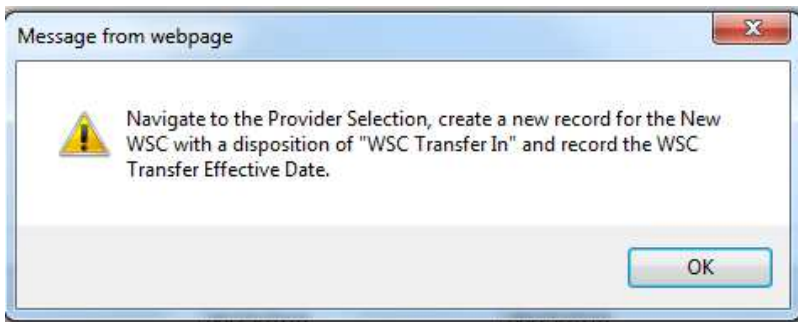
Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Sheppard, Alice	10053	Create records for New WSC	05/04/2018	05/04/2018		New	Buck, Jennifer
Sheppard, Alice	10053	End Date records for Current WSC	05/04/2018	05/04/2018		New	Buck, Jennifer
Sheppard, Alice	10053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



Tip

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

6. Find the Tickler called. **Create records for New WSC** tickler to open it.
  - a. If the person receiving the tickler is not the Waiver Liaison assigned to the current WSC, hover over the arrow next to the Tickler to click **Reassign** to reassign it to the correct person.
  - b. Otherwise, click to open the Tickler. The following message displays:



7. To complete the Tickler, click the **View Consumer Record** option from the tickler flyout menu to navigate quickly to the Consumer record from the tickler or can complete a quick Search to navigate to the consumer's record.

Workflow Wizard

Navigate to the Provider Selection, create a new record for the New WSC with a disposition of "WSC Transfer In" and record the WSC Transfer Effective Date,

- [Notify All Providers via an Alert Note](#)
- Create records for New WSC**

- Open
- Cancel
- Edit
- Reassign
- Complete
- View Consumers Record

8. Click the **Provider Selections** tab.

9. Click **File > Add Provider**. The Provider Selection Detail page opens.

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

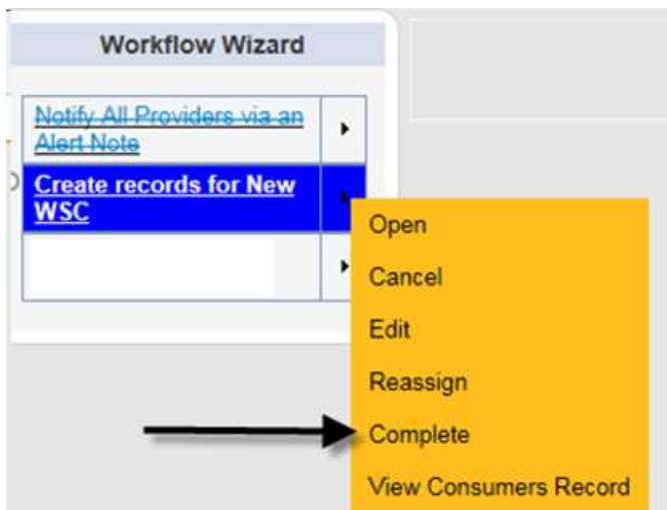
10. Update the following fields:

- a. Division = default to APD
- b. Selected by = defaults to Self
- c. Selection date = defaults to today
- d. Provider = select the ellipsis to search for and select the new WSC Agency
- e. Referral Type = Waiver Support Coordinator
- f. Disposition = WSC Transfer In

- g. Disposition Date = defaults to today
- h. Provider Worker = search for and select the new WSC Worker.
- i. WSC Transfer Effective Date = enter the effective date of the transfer

11. Click **File > Save and Close Provider.**

12. Upon completing the tasks outlined in the message tickler, navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.



### **Add a new Planned Service for the new WSC, validate and create the authorization**

1. Upon saving the Provider Selection Record with a Disposition = WSC Transfer In, a Workflow Wizard will trigger for the user with three Ticklers.
  - a. Add a new Planned Service for the new WSC, validate and create the Authorization.
  - b. On the effective date, update Primary Worker on the Division record to the new WSC
  - c. On the effective date, close Previous WSC's Provider Selection Record by changing the disposition to Closed. The end date and WSC-Transfer Out disposition were updated on the previous WSC's Provider Selection record in an earlier step for tracking purposes. This tickler is for the WSC to close the Previous WSC Provider Selection record which removes access to the consumer's record for the previous WSC.
  
2. From the open Workflow Wizard window click the **Add a new Planned Service for the new WSC, validate and create the authorization** tickler. The Plans list view displays.

**File**

**Workflow Wizard**

Navigate to the Plans tab and add a Planned Service, validate, then create the Authorization.

**Add a new Planned Service for the new WSC, validate and create the Authorization**

On the effective date, close Previous WSC's Provider Selection record by changing the Disposition to Closed.

On the Effective Date update the Primary Worker on the Division record to the new WSC

**Filters**

Division

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

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

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

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

**File Tools**

Plan Information

**Planned Services**

QSI Needs

Plan Notes

**Filters**

Max Amount

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

Provider	Service Code	Service Description	Total No of Units	Unit Type	Rate	Max Amount	Begin Date	End Date	Auth ID
	4250	Specialized Mental Health Counseling Assessment	1.0000	Units	\$128.21	\$128.21	04/01/2018	06/30/2018	<input 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"/>
Generic CDC+ Provider	4446	Consumable Medical Supplies (non-CDC)	36.0000	Item	\$2.00	\$72.00	04/01/2018	04/09/2018	<input type="checkbox"/>

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

6. 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.

**File**

**Planned Services**

Division: APD

Fiscal Year: 2021

Begin Date: 07/01/2020

End Date: 06/30/2021

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

Service Ratio: [Dropdown]

Consumer County: Miami-Dade

Geographic Differential: Geographic

Provider Rate Type: Solo

Service Code: G9012:UC

Service Description: (4270) Support Coordination

Unit Type: Month

Units Per: 1

Units of Measure: Month - Round Up

Total No of Units: 12

Provider ID: 14988

Provider: A Test Provider

Rate: \$148.69

Max Amount: \$1,784.28

Amount Requested: [Field]

Authorization Notes/Comments: WSC comments visible on the authorization

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

8. Upon completing the tasks outlined in the message tickler, navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.

**File**

**Workflow Wizard**

Navigate to the Plans tab and add a Planned Service, validate, then create the Authorization.

**Add a new Planned Service for the new WSC, validate and create the Authorization**

On the effective date, close Previous WSC's Provider Selection record by changing the Disposition to Closed.

On the Effective Date update the Primary Worker on the Division record to the new WSC

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

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

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

Open, Cancel, Edit, Reassign, **Complete**, View Consumers Record

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

### Close Previous WSC's Provider Selection Record

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

purposes, but these ticklers are closing the records, removing access for the previous WSC.

- a. On the effective date, update Primary Worker on the Division record to the new WSC. This tickler will trigger immediately but the user should not complete it until the effective date because the changes are effective immediately.
- b. On the effective date, close Previous WSC's Provider Selection Record by changing the disposition to Closed. The end date was added to the previous WSC's Provider Selection record in an earlier step. This tickler is for the WSC to close the Previous WSC Provider Selection record. This tickler will trigger immediately but the user should not complete it until the effective date because the changes are effective immediately.
- c. Add a new Planned Service for the new WSC, validate and create the Authorization.

2. Click the **On the effective date Close Previous WSC's Provider Selection Record by changing the Disposition to Closed** tickler. The Provider Selection list view displays.

The screenshot shows the iConnect interface for Provider Selections. The top navigation bar includes the iConnect logo, the user name John Sheppard, the date 9/13/2018 3:06 PM, and the page title Provider Selections. Below the navigation bar is a File menu. The main content area is divided into a Workflow Wizard on the left and a search/filter section on the right. The Workflow Wizard has three steps: 1. Add a new Planned Service for the new WSC, validate and create the Authorization; 2. On the effective date, close Previous WSC's Provider Selection record by changing the Disposition to Closed (highlighted in blue); 3. On the Effective Date update the Primary Worker on the Division record to the new WSC. The search/filter section shows filters for Disposition (Closed), Selection Date (Not Equal To), and a search button. Below the filters, it indicates 12 Provider Selections record(s) returned, now viewing 1 through 12. A table displays the following data:

Division	Selection Date	Provider	APD Vendor #	Provider Worker	Disposition	Deactivated Date	LOS
APD	07/18/2018	WSC Agency1		Buck, Jennifer	WSC Transfer Out		

3. Click the previous WSC Provider Selection Record. The Details page displays. Update the following fields:
  - a. Disposition = Closed
  - b. Disposition Date = defaults to current date but can be edited

Provider	Division *	APD
Provider Workers	Selected By	Buck, Jennifer ... Clear Details
Beds	Selection Date	04/30/2018
Events	Provider *	WSC Agency1 Details
Track Disposition	Referral Type *	Waiver Support Coordinator
	Disposition *	Closed
	Disposition Date	04/30/2018
	WSC Transfer Effective Date	05/09/2018
	WSC Transfer End Date	
	Comments	
	Deactivated Date	05/09/2018

4. Click **File > Save and Close Provider**

5. Navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.

oood iConnect

File

**Workflow Wizard**

- [Add a new Planned Service for the new WSC, validate and create the Authorization](#)
- On the effective date, close Previous WSC's Provider Selection record by changing the Disposition to Closed.
- [On the Effective Date update the Primary Worker on the Division record to the new WSC](#)
- [Document WSC Transition Meeting](#)

- Open
- Cancel
- Edit
- Reassign
- Complete
- View Consumers Record

### Update the Primary Worker

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

- a. On the effective date, update Primary Worker on the Division record to the new WSC. This tickler will trigger immediately but the user should not complete it until the effective date because the change is effective immediately.
- b. On the effective date, close Previous WSC's Provider Selection Record by changing the disposition to Closed. The end date was added to the previous WSC's Provider Selection record in an earlier step. This tickler is for the WSC to close the Previous WSC Provider Selection record. This tickler will trigger immediately but the user should not complete it until the effective date because the change is effective immediately.
- c. Add a new Planned Service for the new WSC, validate and create the Authorization.

The screenshot shows the iConnect Workflow Wizard interface. At the top, there is a header with the iConnect logo on the left, and the text "Welcome, Jennifer Buck | Workflow Wizard" and "9/13/2018 2:13 PM" on the right. Below the header is a "File" menu bar. The main content area is titled "Workflow Wizard" and contains a list of three tasks, each with a right-pointing arrow:

Workflow Wizard	
<a href="#">Add a new Planned Service for the new WSC, validate and create the Authorization</a>	▶
<a href="#">On the effective date, close Previous WSC's Provider Selection record by changing the Disposition to Closed.</a>	▶
<a href="#">On the Effective Date update the Primary Worker on the Division record to the new WSC</a>	▶

1. Click the **On the Effective date, update Primary Worker** tickler. The Division list view displays.

**Workflow Wizard**

- [Add a new Planned Service for the new WSC, validate and create the Authorization](#)
- [On the effective date, close Previous WSC's Provider Selection record by changing the Disposition to Closed.](#)
- On the Effective Date update the Primary Worker on the Division record to the new WSC**

**Filters**

Disposition   AND

Open Date   AND

Division

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

Division	Disposition	Primary Worker	Secondary Worker	Open Date	Close Date	LOS
FOR	Forensic Open	Buck, Jennifer		08/03/2018		41
APD	APD Eligible - Non Waiting List	Buck, Jennifer	Buck, Jennifer	05/23/2018		113

2. Click the **APD Eligible – Waiver** Division record. The Division details page opens. Update the following fields:
  - a. Primary Worker = select the ellipsis to search for and select the new WSC Worker.
  - b. A notification will display informing the user changing the Primary Worker on the Division record will reassign all pending assessments, authorizations, plans, and ticklers from the old WSC to the new WSC. Click **OK** to accept.

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

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

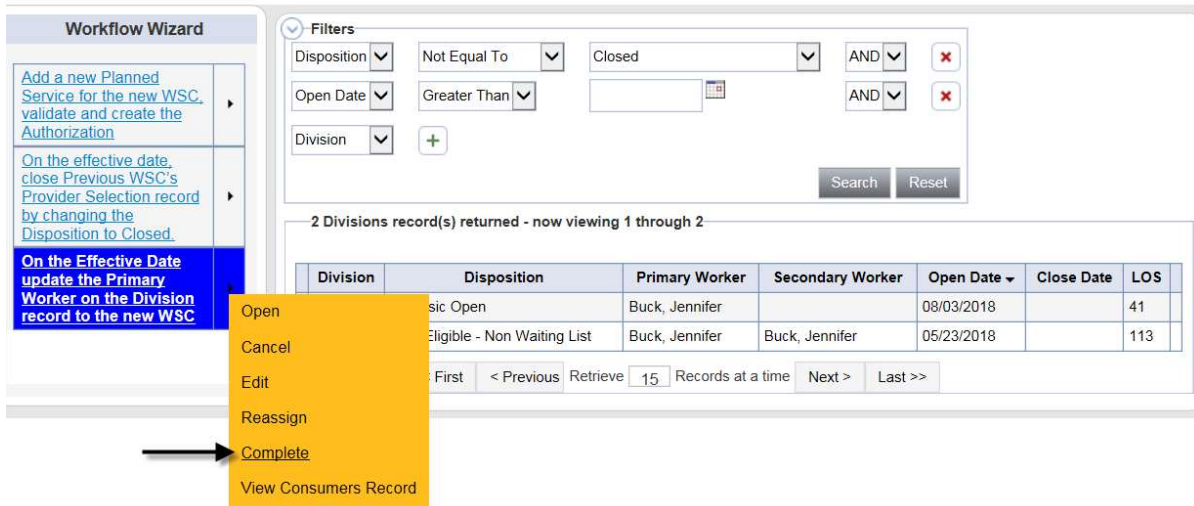
3. Click **File** > **Save and Close Division**.



**Tip**

*When the Primary Worker is updated on the Division page, the Primary Worker on the Programs page is also updated.*

4. Upon completing the tasks outlined in the message tickler, navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.



### WSC Selection – Same Agency/Provider

Depending on the reason for the change the Region staff or the old WSC will work with the consumer to select a new WSC and effective date. A note is added in iConnect to begin the reassignment process. NOTE: this is an area of organizational change. Regions will be involved to ensure caseload capacity is not exceeded.

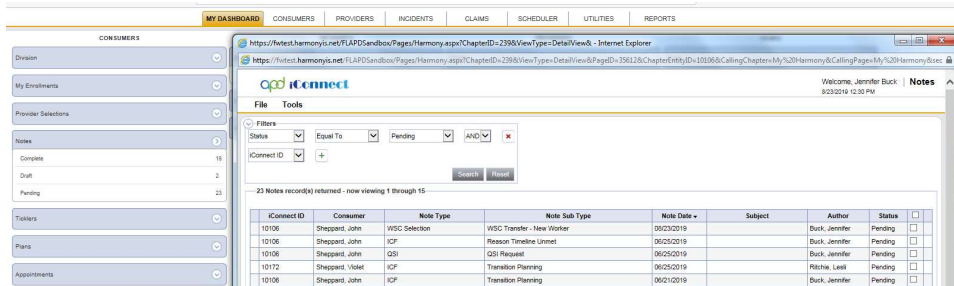
### New WSC Request - Add a Note

1. To begin, log into iConnect and set Role = Region Waiver Workstream Worker or WSC. Click **Go**.
2. Navigate to the consumer's record and click the **Notes** tab > click **File** > **Add Notes**.
3. The Note details page displays. Update the following fields.
  - a. Division = APD
  - b. Note Type = WSC Selection
  - c. Note Subtype = WSC Transfer – New Worker
  - d. Status = Pending
  - e. Note = details of the requested change
  - f. Attach all supporting documentation


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

4. Click **File** > **Save and Close Notes**
  
5. The Consumer has selected new WSC. Update the Note with a **document** demonstrating the consumer was given choice within the agency. Then send the Note for Region Review before accepting the case.
  
6. The Region staff or WSC will navigate to the consumer's Record and select the **Notes** tab. Select the **WSC Selection Note** to open. The Note Details page displays. Update the following fields:
  - a. Note Type = remains WSC Selection
  - b. Sub Type = remains WSC Transfer – Worker
  - c. Note = details of the selected WSC and request for region review before accepting the case.
  - d. Status = remains Pending
  - e. Recipients = Region Waiver Lead
  - f. Attachment = search for and select the saved **document** and attach it to the note.

- The Region Waiver Lead will monitor My Dashboard for incoming Notes. The Region Waiver Lead will locate the WSC Selection Note in the Notes queue and select it to open.



- The Region Waiver Lead will also check the Caseload report monthly to ensure there are no limit violations. This report will be accessed from an APD SharePoint site.
- The Region Waiver Lead will approve or not approve based on the requested WSC's case load and will update the Note with his/her decision. Update the following fields:
  - Note Type = remains WSC Selection
  - Sub Type = change to WSC Transfer Approved or WSC Transfer Not Approved
  - Note = decision details to approve or not approve the case load
  - Status = Complete
  - Recipients = Old WSC, Agency Owner/Manager, Waiver Workstream Worker


John Sheppard | Notes  
Last Updated by jBuck  
at 8/23/2019 12:29:31 PM

**File Tools Reports**

---

Division \*

Note By \*

Note Date \*

Program/Provider

Note Type \*

Note Sub-Type

Description

Note   
 On 8/23/2019 at 12:52 PM, Jennifer Buck wrote: Approving the case load

Status \*

Date Completed

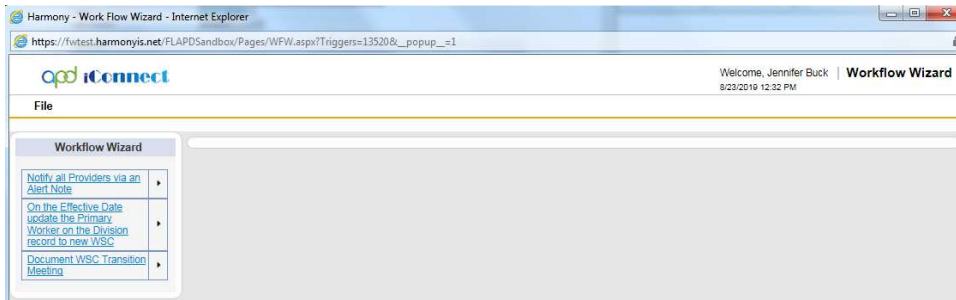
**Attachments**  
 Add Attachment

Document	Description	Category	Action
There are no attachments to display			

**Note Recipients**  
 Add Note Recipient:  ... Clear

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	08/23/2019		Unread		<a href="#">Remove</a>

10. The old WSC will monitor My Dashboard for incoming notes for notification that the Waiver Lead has approved or not approved the case load for the new WSC.
  - a. When approved, the old WSC will complete the transition meeting with the new WSC. Proceed to the [WSC Transition Meeting](#) section.
  - b. When not approved, the old WSC will work with the consumer to select a new WSC and effective date.
  
11. Saving the WSC Selection Note with SubType = WSC Transfer Approved and Status = Complete, triggers a Workflow Wizard for the user/Region Waiver Lead, with the following ticklers:
  - a. Notify all Providers via an Alert Note. The Waiver Lead will complete this tickler immediately.
  - b. On the Effective Date update the Primary Worker on the Division record to new WSC. The Waiver Lead will reassign this tickler to the new WSC.
  - c. Document WSC Transition Meeting. The Waiver Lead will reassign this tickler to the new WSC.

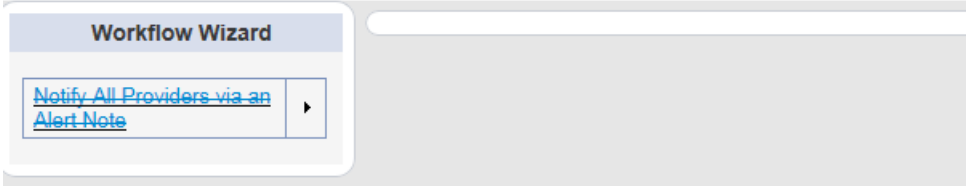


## Notify All Providers via an Alert Note

1. Saving the WSC Selection Note with SubType = WSC Transfer – New Worker and Status = Complete, triggers the **Notify all Providers via an Alert Note** tickler. Select it to open. The Notes Detail page displays.
2. Update the following fields:
  - a. Division = APD
  - b. Note Type = WSC Selection
  - c. Note Subtype = Notification of WSC Change
  - d. Note = Add the message you want the providers to see each time they login into the account.
  - e. Status = Alert

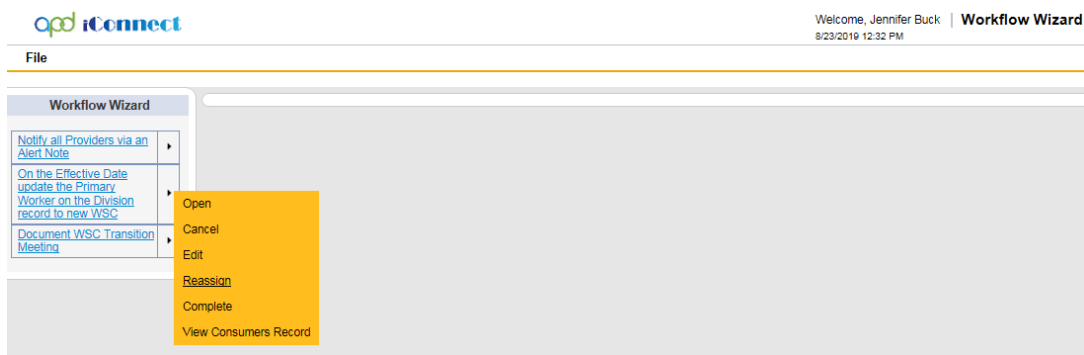
3. Click **File > Save Notes**. The Tickler is marked as complete.

File

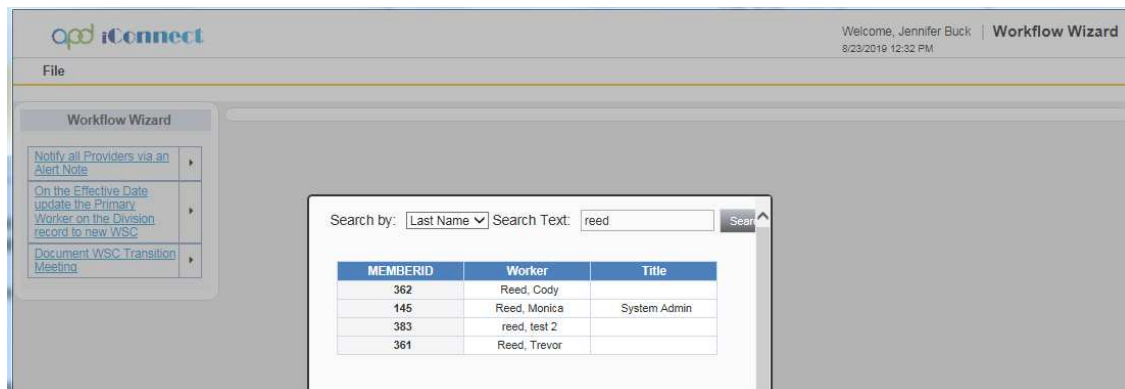


## Update Primary Worker

1. Saving the WSC Selection Note with SubType = WSC Transfer – New Worker and Status = Complete, triggers the **On the Effective Date update the Primary Worker on the Division record to new WSC** tickler. The Waiver Lead will reassign it to the new WSC.
2. From the tickler flyout menu, select **Reassign**.



3. Search for and select the new WSC name. When select, the tickler is automatically reassigned.



4. The new WSC will monitor **My Dashboard** for incoming ticklers.

- Click the **On the effective date, update the Primary Worker on the Division record to the new WSC** tickler. The consumer's Divisions list view grid will display.

File

**Workflow Wizard**

On the Effective Date update the Primary Worker on the Division record to new WSC

[Update Primary Worker](#)

[Document WSC Transition Meeting](#)

Filters

Disposition  Closed

Open Date

Division

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

Division	Disposition	Primary Worker	Secondary Worker	Open Date	Close Date	LOS
FOR	Tracking	Tierney, Jacqueline		05/02/2015		40
APD	APD Eligible - PESG Assigned	Reed, Monica	Tierney, Jacqueline	04/04/2015		68

- On the effective date of the new WSC, the new WSC will update the primary worker on the Division which will automatically update the worker on the associated Program records and Provider Selection records.
- Select the **APD Eligible – Waiver** record.
- The Division details page displays. Update the following fields:
  - Primary Worker = select the ellipsis to search for and select the new WSC Worker.
  - A notification will display informing the user changing the Primary Worker on the Division record will reassign all pending assessments, authorizations, plans, and ticklers from the old WSC to the new WSC. Click **OK** to accept.

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

- Secondary Worker = Region Waiver Lead

Division	<b>Events</b>	
Events	Divison *	APD
Track Disposition	Disposition *	APD Eligible - Waiver
	Disposition Date	05/09/2018
	Open Date	04/03/2018
	Data Entry Date	04/03/2018
	Primary Worker *	Worker, Applicable <span style="font-size: 2em;">→</span>
	Secondary Worker	Buck, Jennifer
	Application Received Date *	04/01/2018
	Interested in ICF/IID	▼
	Age Category at Time of Application *	6 and Above ▼
	Application Pended Due Date	
	Eligibility Documentation Complete Date	
	<b>Referral Source</b>	
	Referral Date	04/03/2018
	Referral Source	▼
	Referral Reason	▼

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

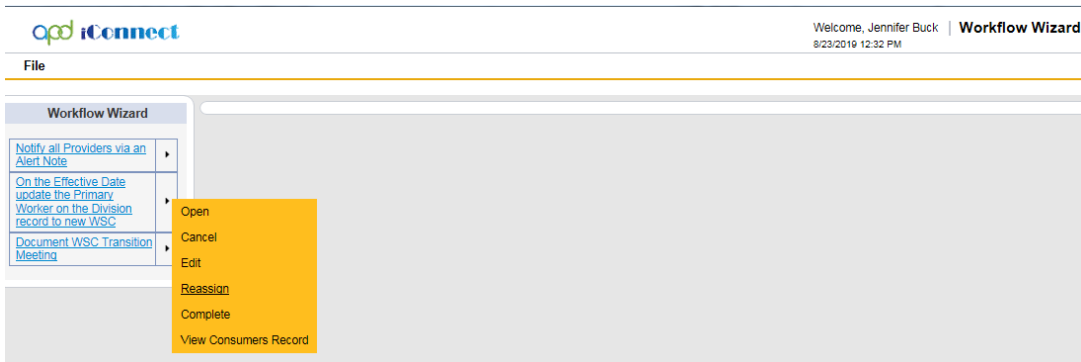
10. Upon completing the tasks outlined in the tickler, navigate back to the workflow wizard screen. Click **Complete** from the tickler flyout menu. The tickler is marked as complete.

11. When the primary worker on the division record is changed on the effective date, the worker on the provider selection record will update automatically to the new WSC and the previous worker/old WSC on the provider selection record will close automatically.

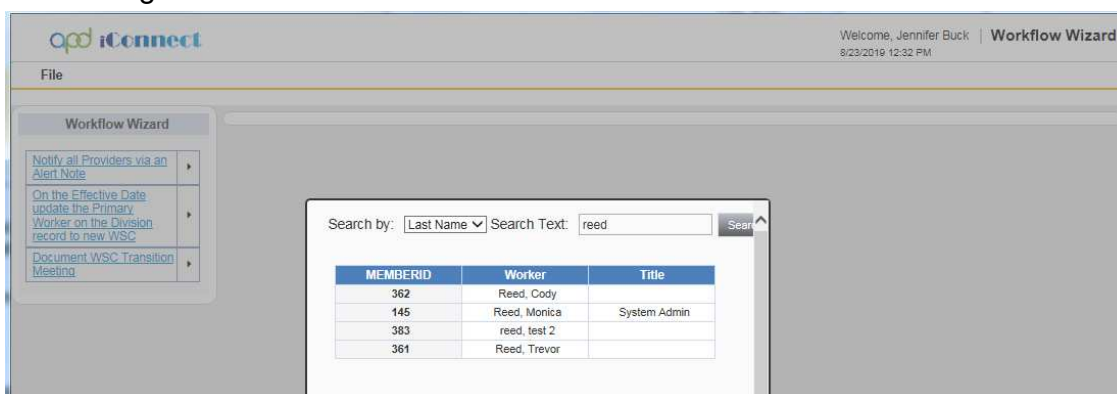
### WSC Transition Meeting

1. Saving the WSC Selection Note with SubType = WSC Transfer – New Worker and Status = Complete, triggers the **Document WSC Transition Meeting** tickler. The Waiver Lead will reassign it to the new WSC.

2. From the tickler flyout menu, select **Reassign**.



3. Search for and select the new WSC name. When select, the tickler is automatically reassigned.



4. The new WSC will monitor **My Dashboard** for incoming ticklers. Locate the **Document WSC Transition Meeting** tickler. Select to open the Notes detail page. Once the transition process is complete, the new WSC will complete this tickler by adding a Note confirming the transition is complete. For now, it can be closed.
5. As part of the WSC Transition process, the previous WSC will meet and discuss the Consumer case with the new WSC.
6. The previous WSC will mark the Person-Centered Support Plan form as complete, making it ready only. The new WSC will create a new Person-Centered Support Plan duplicated from the one completed by the previous WSC.
7. The previous WSC will navigate to the consumer's record and click on the Forms tab. Click the **Person-Centered Support Plan** form with Status = Open.

MY DASHBOARD CONSUMERS

Kastner, Martin (209720)

Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Module Us...  
Demographics Divisions Consumer Budgets Programs Provider Selections SAN Notes Forms Appointments Plans Pre-Enrollment Claim

Filters  
Form  
Search Reset

2 Consumers Forms record(s) returned - now viewing 1 through 2

Form	Review	Review Date	Worker	Division	Status
Person-Centered Support Plan eff. 11/4/2021	Initial	12/14/2021	Worker_19248, Training	APD	Complete
Person-Centered Support Plan eff. 11/4/2021	Initial	11/03/2022	Brown-Farrier, Mollie	APD	Open

First Previous Records per page 15 Next Last

8. Update the following fields:
  - a. Review the form and ensure it is complete.
  - b. Change the Status = Complete

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

ood iConnect

Alice Sheppard  
Last Updated by j buck  
at 8/10/2018 3:19:49 PM

Forms

File Reports

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

Annual  
05/2018  
D  
Buck, Jennifer

Worker \*  
Status \*  
Provider/Program \*  
Approved Date

Buck, Jennifer  
Complete  
WSC Agency1  
09/26/2018

PERSON-CENTERED SUPPORT PLAN

Support Plan Effective Date\*  
Is the Consumer 18 or over? \*  
Supported Living Need?

05/01/2018  
Yes  
No

10. The new WSC will use the **Duplicate Assessment** feature to copy information such as the social history from the Person-Centered Support Plan completed by the previous WSC into a new Person-Centered Support Plan for the new WSC. The new WSC will update all section of the support plan with new information and change the effective date of the plan.
11. To do so, with the Person-Centered Support Plan created from the previous WSC opened, click **File > Duplicate Assessment**. A notification window displays. Click OK. The new Person-Centered Support Plan form that is an exact copy of the existing Person-Centered Support Plan form is displayed.

12. Update the following fields:

- a. In the Form header, change the **Review Type** = Annual.
- b. Update the support plan effective date.
- c. Make updates to goals, needs, and other important factors.

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

14. Following the WSC Transition meeting with the Consumer, the WSC will locate the **Document WSC Transition Meeting** tickler from **My Dashboard**. Select it to open.

15. A new Consumer Note record opens. Update the following fields:

- a. Division = APD
- b. Note Type = WSC Selection
- c. Note Subtype = WSC Transition Note
- d. Note = Add details recording the meeting with the Consumer
- e. Status = Complete

**Workflow Wizard**

Reassign to the New WSC

Document WSC Transition Meeting

**Notes Details**

Division *	APD
Note By *	Buck, Jennifer
Note Date *	05/09/2018
Program/Provider	
Note Type *	WSC Selection
Note Sub-Type	WSC Transition Note
Description	
Note	Add details recording the meeting with the Consumer
Status *	Complete
Date Completed	05/09/2018

16. Click **File > Save Note**.

17. The tickler is marked as complete.

### Inter-region Transfer on Pre-Enrollment

The Region Office may receive a request to transfer a Consumer on the Pre-Enrollment to a different Pre-Enrollment Support Coordinator due to a pending move or a new address.

1. To begin, log into iConnect and set Role = Pre-Enrollment Workstream Worker. Click **Go**.
2. Navigate to the consumer's record, click on the **Notes** tab.
3. Click **File > Add Notes**.

APD iConnect

Alice Sheppard | Notes | Sign Out | Role Region

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

File Tools Reports Ticklers View Consumer Incident

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS REPORTS

Sheppard, Alice (10053)

Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Module User

Demographics Divisions Consumer Budgets Programs Provider Selections SANS Notes Forms Appointments Plan

Filters

Note Date [v] +

Search Reset

45 Notes record(s) returned - now viewing 1 through 15

4. The Note details page displays. Update the following fields:
  - a. Division = APD
  - b. Note Type = Central Record Transfer
  - c. Note Subtype = Pending Central Record Transfer
  - d. Note recipient = select the ellipsis to search for and select the Pre-Enrollment Workstream Lead at the Receiving Region
  - e. Status = Pending
  - f. Attach all supporting documentation

File Tools

An asterisk (\*) indicates a required field

Notes Details

Division \* APD

Note By \* Baer, Sylvia

Note Date \* 04/09/2024

Program/Provider

Note Type \* Central Record Transfer

Note Sub-Type Pending Central Record Transfer

Description Pending Central Record Transfer

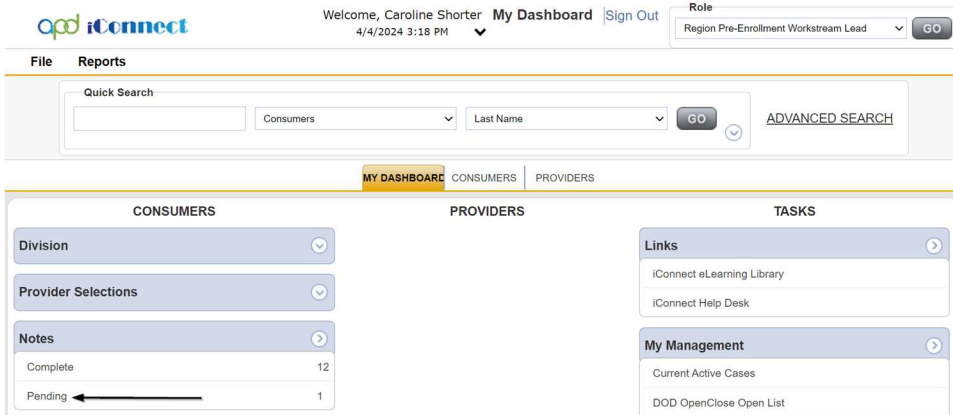
Note

Region Office has received a request to transfer a Consumer on Pre-Enrollment

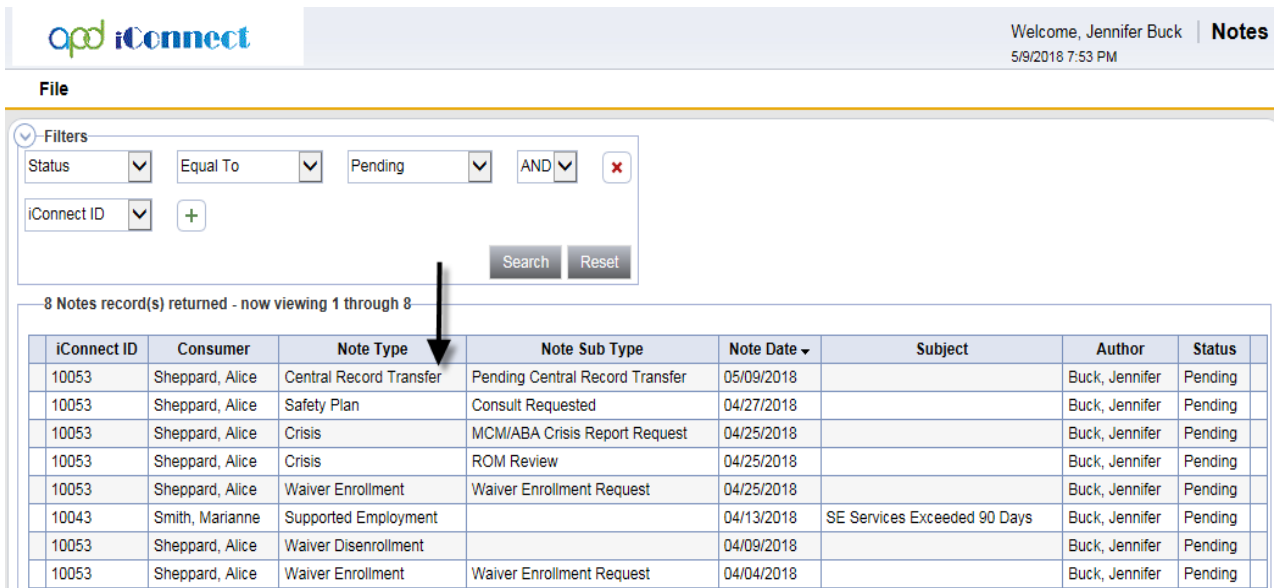
Status \* Pending

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

6. The Region Pre-Enrollment Workstream Lead will monitor his/her My Dashboard > Notes queue.



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



8 Notes record(s) returned - now viewing 1 through 8

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
10053	Sheppard, Alice	Central Record Transfer	Pending Central Record Transfer	05/09/2018		Buck, Jennifer	Pending
10053	Sheppard, Alice	Safety Plan	Consult Requested	04/27/2018		Buck, Jennifer	Pending
10053	Sheppard, Alice	Crisis	MCM/ABA Crisis Report Request	04/25/2018		Buck, Jennifer	Pending
10053	Sheppard, Alice	Crisis	ROM Review	04/25/2018		Buck, Jennifer	Pending
10053	Sheppard, Alice	Waiver Enrollment	Waiver Enrollment Request	04/25/2018		Buck, Jennifer	Pending
10043	Smith, Marianne	Supported Employment		04/13/2018	SE Services Exceeded 90 Days	Buck, Jennifer	Pending
10053	Sheppard, Alice	Waiver Disenrollment		04/09/2018		Buck, Jennifer	Pending
10053	Sheppard, Alice	Waiver Enrollment	Waiver Enrollment Request	04/04/2018		Buck, Jennifer	Pending

8. The Note Details page displays. Update the following fields:
  - a. Sub Type = Central Record Transfer Completed
  - b. Note = add a summary of the transfer assignment and Append Text to Note.
  - c. Note Recipient = select the ellipsis to search for and select the Pre-Enrollment Support Coordinator in the Receiving Region.
  - d. Status = Complete

File Tools

Notes

An asterisk (\*) indicates a required field

**Notes Details**

Division \* APD

Note By \* Baer, Sylvia

Note Date \* 04/09/2024

Program/Provider

Note Type \* Central Record Transfer

Note Sub-Type → Central Record Transfer Completed

Description Central Record Transfer Completed

Note

On 4/9/2024 at 10:41 AM, Sylvia Baer wrote:  
Region Office has received a request to transfer a Consumer on Pre-Enrollment

On 4/9/2024 at 10:42 AM, Sylvia Baer wrote:  
assigned to new Pre-Enrollment Support Coordinator

New Text

B I U 16px A

Append Text to Note

Status \* → Complete

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

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

opd iConnect

Martin Kastner  
Last Updated by sylvia.baer@apdcares.org  
at 4/8/2024 4:37:01 PM

Divisions Sign Out

Role  
Region Pre-Enrollment Workstream Lead

File Tickers Word Merge

Quick Search

Consumers Last Name GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS PROVIDERS UTILITIES CASES

Kastner, Martin (209730)

Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Module User

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

Filters

Disposition Not Equal To Closed AND

Open Date Greater Than MM/DD/YYYY AND

Division +

Search Reset

1 Consumers Divisions record(s) returned - now viewing 1 through 1

Division	Disposition	Primary Worker	Secondary Worker	Open Date	Close Date	LOS
APD →	APD Eligible - Walver	Baer, Sylvia	Brown-Ferrier, Mollie	01/01/2020		1560

First Previous Records per page 15 Next Last

11. Select the APD Division record to open it.

12. The Division Details page displays. Update the following fields:

- Primary Worker = new Pre-Enrollment Support Coordinator

- b. A notification will display informing the user changing the Primary Worker on the Division record will reassign all pending assessments, authorizations, plans, and ticklers from the old WSC to the new WSC. Click **OK** to accept.

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

OK

Cancel

- c. Secondary Worker = Clinical Workstream Lead

The screenshot shows the iConnect software interface. At the top, the user is identified as Alice Sheppard, and the record is for a Division. The interface includes a menu bar with 'File' and 'Word Merge'. On the left, there is a sidebar with 'Division' selected. The main area displays the 'Events' section for a Division record. The record details are as follows:

Division *	APD
Disposition *	APD Eligible - Waiver
Disposition Date	05/09/2018
Open Date	04/03/2018
Data Entry Date	04/03/2018
Primary Worker *	Worker, Applicable
Secondary Worker	Buck, Jennifer
Application Received Date *	04/01/2018
Interested in ICF/IID	
Age Category at Time of Application *	6 and Above
Application Pended Due Date	
Eligibility Documentation Complete Date	
Referral Source	
Referral Date	04/03/2018

Arrows in the image point to the Primary Worker and Secondary Worker fields.

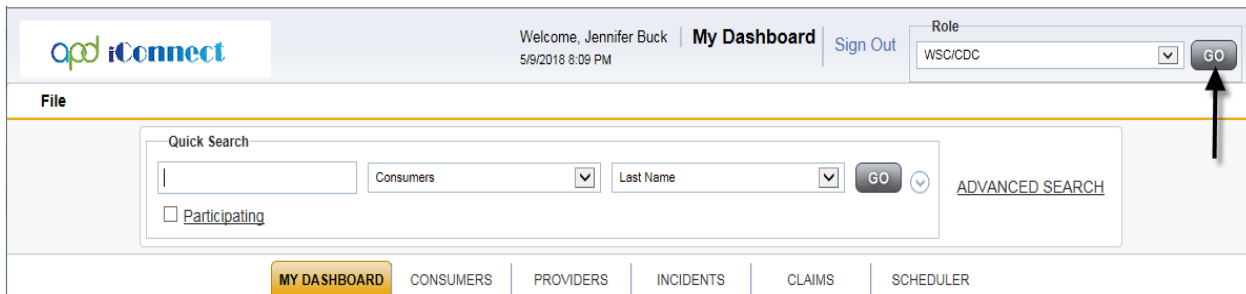
13. Click **File > Save and Close Division.**

## Inter-region Transfer on Waiver

Prompted by an Address Change Request from the Consumer, the WSC will update the consumer's demographics record with the new address. If there is a need to transfer the consumer to a different region, the WSC should determine if Residential Placement is necessary. If the Consumer requires Residential Placement, proceed to the Residential Planning section. If not, the Receiving Region Office will be notified of the incoming Consumer via a Note.

## Notify the Receiving Region Office via a Note

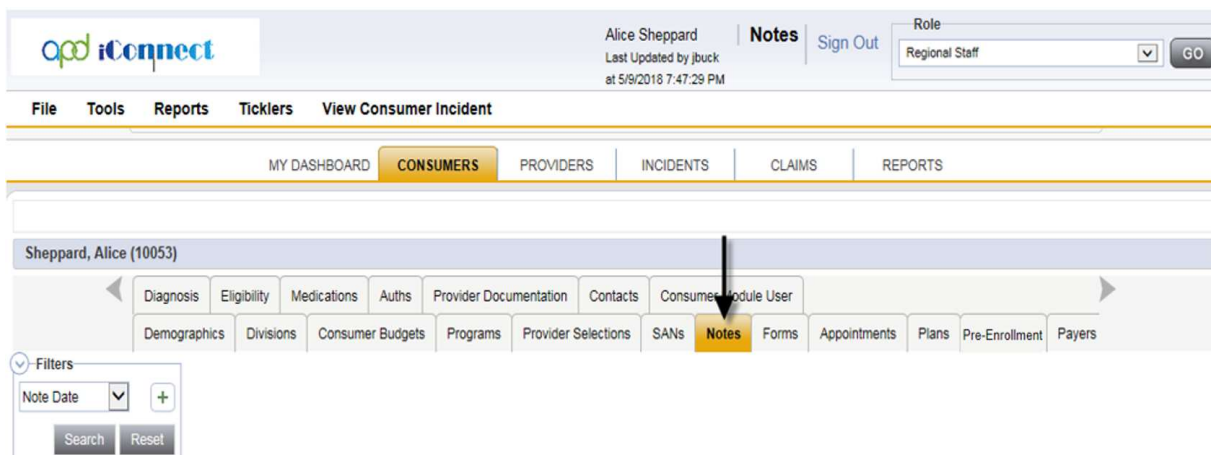
1. To begin, log into iConnect and set Role = WSC/CDC. Click **Go**.



The screenshot shows the iConnect dashboard. At the top left is the iConnect logo. To the right, it says "Welcome, Jennifer Buck" and "5/9/2018 8:09 PM". There are links for "My Dashboard" and "Sign Out". On the far right, there is a "Role" dropdown menu set to "WSC/CDC" and a "GO" button. Below this is a "File" section with a "Quick Search" box containing a search input, a "Consumers" dropdown, and a "Last Name" dropdown. There is a "GO" button and a "Participating" checkbox. To the right of the search box is a link for "ADVANCED SEARCH". At the bottom, there is a navigation bar with buttons for "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", and "SCHEDULER".

2. Navigate to the consumer's record, click on the **Notes** tab.

3. Click **File > Add Notes**.



The screenshot shows the iConnect consumer record page for Alice Sheppard (10053). At the top left is the iConnect logo. To the right, it says "Alice Sheppard" and "Last Updated by j buck at 5/9/2018 7:47:29 PM". There are links for "Notes" and "Sign Out". On the far right, there is a "Role" dropdown menu set to "Regional Staff" and a "GO" button. Below this is a navigation bar with buttons for "File", "Tools", "Reports", "Ticklers", and "View Consumer Incident". Below that is another navigation bar with buttons for "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", and "REPORTS". The main content area shows the consumer's name "Sheppard, Alice (10053)" and a series of tabs: "Diagnosis", "Eligibility", "Medications", "Auths", "Provider Documentation", "Contacts", "Consumer Module User", "Demographics", "Divisions", "Consumer Budgets", "Programs", "Provider Selections", "SANS", "Notes", "Forms", "Appointments", "Plans", "Pre-Enrollment", and "Payers". The "Notes" tab is highlighted with an arrow. Below the tabs is a "Filters" section with a "Note Date" dropdown and a "+" button. There are "Search" and "Reset" buttons.

4. The Note details page displays. Update the following fields:
  - a. Division = APD
  - b. Note Type = Central Record Transfer
  - c. Note Subtype = Pending Central Record Transfer
  - d. Note recipient = select the ellipsis to search for and select the Waiver Workstream Lead at the Receiving Region
  - e. Status = Pending

f. Attach all supporting documentation

File Tools

An asterisk (\*) indicates a required field

**Notes Details**

Division *	APD
Note By *	Baer, Sylvia
Note Date *	04/09/2024
Program/Provider	
Note Type *	Central Record Transfer *
Note Sub-Type	Pending Central Record Transfer
Description	Pending Central Record Transfer
Note	<p><b>B I U</b> 16px <b>A</b></p> <p>Region Office has received a request to transfer a Consumer on Pre-Enrollment</p>
Status *	Pending
Date Completed	

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

6. The Receiving region will send the WSC Selection form to the Consumer and document it was sent in iConnect.

7. From the Notes tab, click **File > Add Note**.

8. The Note details page displays. Update the following fields:

- Division = APD
- Note Type = WSC Selection
- Note Subtype = Selection Form Sent
- Status = Pending

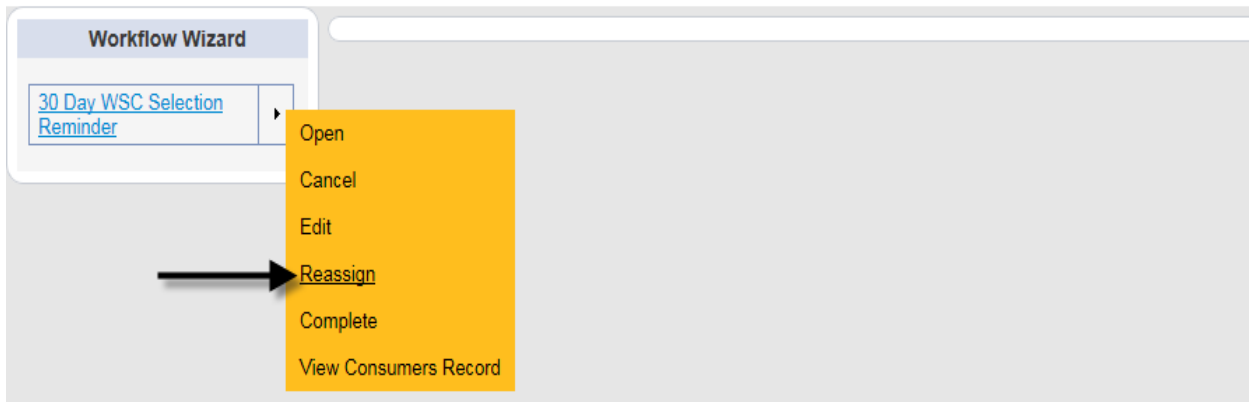
Notes Details	
Division *	APD ▼
Note By *	Buck, Jennifer ▼
Note Date *	05/09/2018
Program/Provider	▼
Note Type *	WSC Selection ▼*
Note Sub-Type	Selection Form Sent ▼
Description	▼ ▲
Note	Sent form to consumer to select new WSC in the new region ▲ ▼

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

10. Upon saving a Note with Note Sub Type = Selection Form Sent, a Workflow Wizard will trigger with the following tickler:

- a. 30-day WSC Selection Reminder. The WSC should reassign this tickler to the Waiver Workstream Lead if the Consumer has already relocated to the receiving region.

11. From the tickler flyout menu, click **Reassign.**

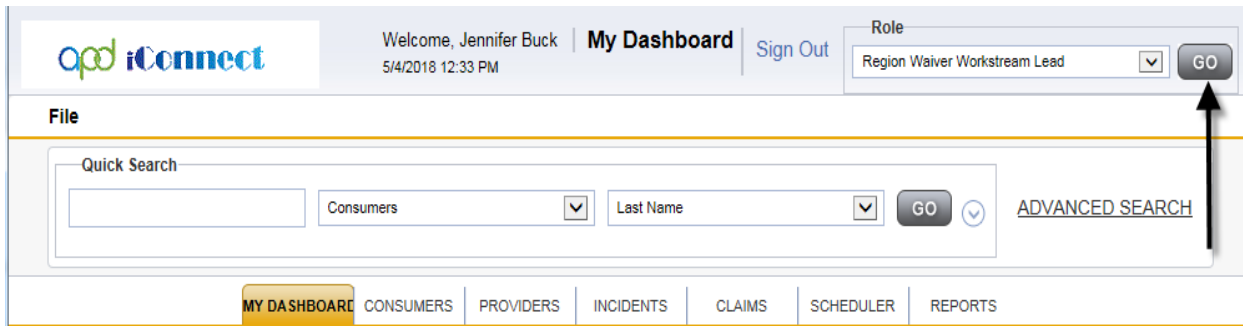


12. Search for and select the receiving Waiver Workstream Lead worker record and the tickler is reassigned.
13. This tickler is visible to the Waiver Workstream Lead on the My Dashboard > Ticklers queue.
14. In 30 days when the tickler is due, the Waiver Workstream Lead will check if the Consumer has selected the WSC indicated by the existence of a WSC Selection/WSC Inter-Region Transfer Note. If the selection has been made, the Waiver Workstream Lead will cancel the tickler by selecting Cancel from the tickler flyout menu.
15. If Consumer has not notified regional office of his/her newly selected Waiver Support Coordinator, the Waiver Workstream Lead will make the selection on the behalf of the Consumer.

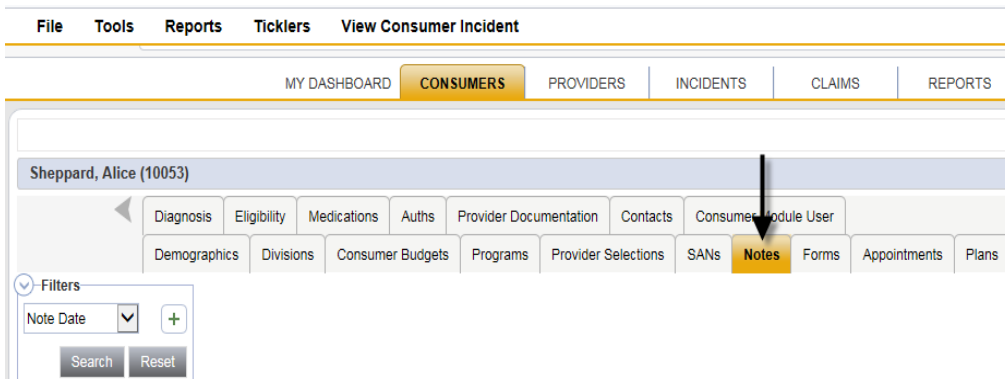
### Consumer selects new WSC

The Consumer notifies the receiving regional office of his/her newly selected Waiver Support Coordinator.

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



2. Navigate to the Consumer Record and click the **Notes** tab.

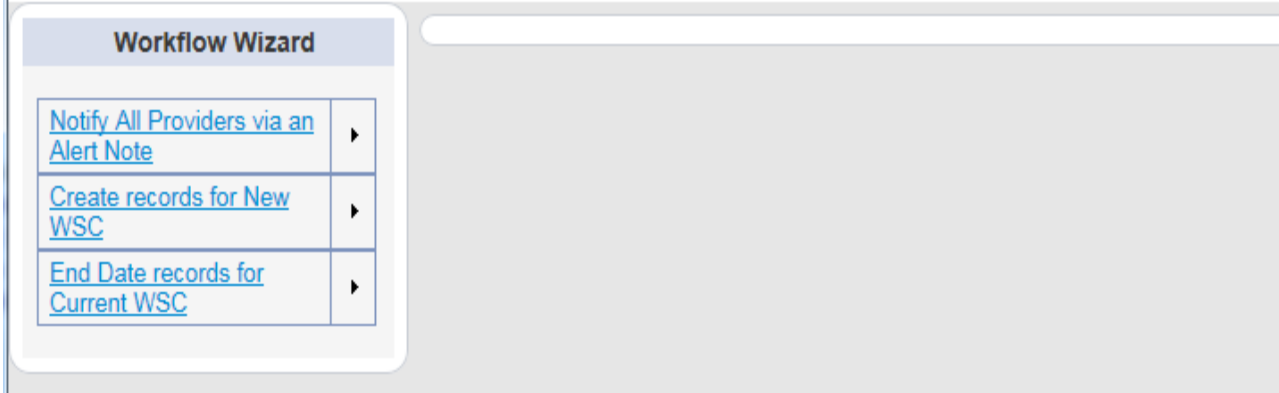


3. Click **File > Add Note**.

4. The Note detail page displays. Update the following fields:
- Division = APD
  - Note Type = WSC Selection
  - Note Subtype = WSC Inter-Region Transfer
  - Status = Complete

Notes Details	
Division *	APD ▼
Note By *	Buck, Jennifer ▼
Note Date *	05/09/2018
Program/Provider	▼
Note Type *	WSC Selection ▼*
Note Sub-Type	WSC Inter-Region Transfer ▼
Description	<input type="text"/>
Note	<div style="border: 1px solid #ccc; height: 100px;"></div>
Status *	Complete ▼
Date Completed	05/09/2018

5. Click **File > Save and Close Notes**.
  
6. Upon saving the Note with Note Type = WSC Selection and Sub Type = WSC Inter-Region Transfer a Workflow Wizard triggers with the following ticklers:
  - a. Notify all Providers via an Alert Note
  - b. End Date records for Current WSC
  - c. Create records for New WSC



### **Notify all Providers via an Alert Note**

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

### **Create Records for New WSC**

1. Click the Create records for New WSC tickler to display a message tickler.
2. Complete [section WSC Selection – New Agency: Create records for New WSC](#) to create the new WSC records.

### **End Date Records for Current WSC**

1. Click the End Date Records for Current WSC tickler to display a message tickler.
2. Complete [section WSC Selection – New Agency: End Date records for Current WSC](#) to end date the Current WSC records.

### **As Needed: WSC Transition Planning Note**

There are times in which the current WSC will need to complete a series of tasks in order to facilitate a consumer's transition to another region. Examples may include assisting the individual/family interviewing providers, coordinating services and transportation to another region, or hosting a transition call with the current circle of supports and the newly selected

circle of supports to ensure that there is a smooth transition. The WSC will document such tasks using a Note.

1. The WSC will navigate to the consumer's record and click **Notes > File > Add Note.**

- a. Update the following fields:
  - i. Division = APD
  - ii. Note Type = WSC Selection
  - iii. Note Subtype = WSC Transition Note
  - iv. Description = WSC will document the types of activities conducted.
  - v. Note = Add details recording the meeting with the Consumer
  - vi. Status = Complete

The screenshot shows a 'Notes Details' form with the following fields and values:

- Division: APD
- Note By: Buck, Jennifer
- Note Date: 05/09/2018
- Program/Provider: (empty)
- Note Type: WSC Selection
- Note Sub-Type: WSC Transition Note
- Description: Transition Meeting with Circle of Support
- Note: Add details recording the meeting with the Consumer
- Status: Complete
- Date Completed: 05/09/2018

Arrows in the image point to the Note Type, Note Sub-Type, Description, and Status fields.

2. Click **File > Save and Close Note.**