



4. In the new Note record, update the following fields:
  - a. Division = APD
  - b. Note Type = Due Process
  - c. Note Subtype = Hearing Request Notification
  - d. Status = Complete
  - e. Attach all supporting documentation

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

The screenshot shows the 'Notes Details' form in the iConnect system. The form is titled 'Notes Details' and contains several fields:
 

- Division \***: APD
- Note By \***: Buck, Jennifer
- Note Date \***: 04/13/2018
- Program/Provider**: (empty)
- Note Type \***: Due Process
- Note Sub-Type**: Hearing Request Notification (indicated by a blue arrow)
- Description**: (empty)
- Note**: Supporting Documentation attached to this Note record
- Status \***: Complete
- Date Completed**: 04/13/2018

6. Upon saving the Note, a Workflow Wizard will trigger with the following Ticklers:
  - a. Send Hearing Request Form - *Assigned to the user (Region Waiver Workstream Lead) who will reassign it to the hearing point of contact in the region. Due Immediately*
  - b. Update Budget - *Assigned to secondary worker, Due Immediately. This tickler is specific to due process for consumers on the waiver. This tickler is not relevant to due process when resulting from denial of eligibility, denial of crisis, etc. This tickler should be cancelled if not applicable to the specific due process request.*
  - c. Update Cost Plan Validate and Update Authorization - *Assigned to WSC, Due Immediately (but cannot update until Budget is updated). This tickler is only relevant to consumers on the waiver. It should be cancelled if the specific due process request is not about planned services.*

7. The Send Hearing Request Form tickler displays for the Region Worker.
8. Reassign the tickler to the Hearing point of contact in the region. Hover over the arrow next to the tickler and click **Reassign**.

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Send Hearing Request Form	04/13/2018	04/13/2018		Ne	
Smith, Marianne	10043	Update Cost Plan, Validate and Update Authorization	04/13/2018	04/13/2018		Ne	


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

Reassign

9. In the Reassign Tickler window, search for the hearing contact for the region. click **Search**, and upon finding a match click on the name.

10. The tickler is reassigned.

11. The assigned Hearing point of contact for the region will monitor their **My Dashboard** for Ticklers related to Due Process. To begin, log into iConnect and set Role = Region Pre-Enrollment or Waiver Workstream Worker. Click **Go**.


 Welcome, Caroline Shorter **My Dashboard** Sign Out 4/4/2024 3:48 PM

Role: Region Pre-Enrollment Workstream Worker **GO**

File Reports

Quick Search:  Consumers Last Name **GO** [ADVANCED SEARCH](#)

12. On the **My Dashboard**, find the Consumers Section and scroll down to the Ticklers Panel. Click on **Ticklers Due** to access the Tickler Queue:

Alert Notes	>
Unread Alert Notes	0
Ticklers	>
Ticklers	11
Plans	>
Approved	1
Pending	1

- a. Use the multi variable search to narrow down the results in the Tickler Queue. Click **Search**.

**File**

**Filters**

Status  Equal To

Last Name  Equal To

iConnect ID

Apply Alert Days Before Due

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Send Hearing Request Form	04/13/2018	04/13/2018		New	Reed, Monica
Smith, Marianne	10043	Update Cost Plan, Validate and Update Authorization	04/13/2018	04/13/2018		New	Reed, Monica

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



**Tip**

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

13. Click on the Tickler called Send Hearing Request Form to open it.

14. A Message Tickler will appear - Hearing Request Form is located outside of iConnect and should be emailed to regional attorney. Click **OK**.

**oed iConnect** Welcome, Monica Reed | **My Dashboard**  
11/27/2018 2:10 PM

**File**

**Workflow Wizard**

[Send Hearing Request Form](#)

The Hearing Request Form is located outside of iConnect and should be emailed to the Regional Attorney. Reassign this tickler to the Hearing point of contact in the region.

15. Once the Hearing request form is emailed to the regional attorney, hover over the arrow next to the Tickler to click **Complete**

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Send Hearing Request Form	04/13/2018	04/13/2018		New	Reed, Monica
Smith, Marianne	10043	Update Cost Plan, Validate and Update Authorization	04/13/2018	04/13/2018		New	Reed, Monica

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

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

16. The Region Staff (Secondary Worker), will monitor their **My Dashboard** for Ticklers related to Due Process. To begin, log into iConnect and set Role = Region Waiver Workstream Lead. Click **Go**.

17. On the **My Dashboard**, find the Consumers Section and scroll down to the Ticklers Panel. Click on **Ticklers Due** to access the Tickler Queue:

a. Use the multi variable search to narrow down the results in the Tickler Queue. Click **Search**.



**Tip**

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

18. In the Tickler Queue, find the second Tickler called Update Budget.

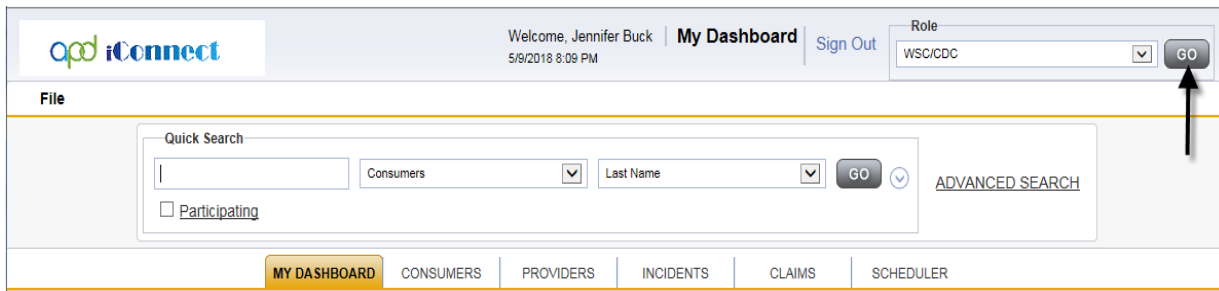
- a. This Tickler is only relevant for Consumers on the waiver. If this specific Due Process request is not about Planned Services, hover over the arrow next to the Tickler to click **Cancel**.
- b. If the Consumer is on the Waiver, hover over the arrow next to the Tickler to click **Reassign**. Select the appropriate Region Staff that handles Budget Entry. That user will be able to access the Tickler from their **My Dashboard**.

19. A Message Tickler will appear - Update applicable Budget prior to Notice of Hearing Rights being sent to Consumer. Click **OK**.

20. Navigate to the appropriate Budget and update it accordingly. [See Chapter 9 | Consumer Budget](#)

21. When finished, hover over the arrow next to the Tickler to click **Complete**.

22. The Primary Worker (Pre-Enrollment or Waiver Support Coordinator) will monitor their **My Dashboard** for Ticklers related to Due Process. To begin, log into iConnect and set Role = WSC/CDC or Region Pre-Enrollment Workstream Worker. Click **Go**.



23. On the **My Dashboard**, find the Consumers Section and scroll down to the Ticklers Panel. Click on **Ticklers Due** to access the Tickler Queue:



- a. Use the multi variable search to narrow down the results in the Tickler Queue. Click **Search**.

File

**Filters**

Status  Equal To  AND

Last Name  Equal To  AND

iConnect ID  +

Apply Alert Days Before Due

Search Reset

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Send Hearing Request Form	04/13/2018	04/13/2018		New	Reed, Monica
Smith, Marianne	10043	Update Cost Plan, Validate and Update Authorization	04/13/2018	04/13/2018		New	Reed, Monica

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



**Tip**

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

24. In the Tickler Queue, find the Tickler called Update Cost Plan, Validate and Update Plan Authorization

- a. This Tickler is only relevant for Consumers on the waiver. If this specific Due Process request is not about Planned Services, hover over the arrow next to the Tickler to click **Cancel**.

25. If the Consumer is on the Waiver, click to open the Tickler and the consumer's Cost Plan List View Grid will open:

File

**Workflow Wizard**

[Update Cost Plan, Validate and Update Authorization](#)

**Filters**

Division  +

Search Reset

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

+	Division	Program	Worker	Cost Plan Creation Date	Status	Cost Plan Begin Date
<input type="checkbox"/>	APD	CDC+	Tierney, Jacqueline	04/09/2018	Draft	04/09/2018
<input type="checkbox"/>	APD		Tierney, Jacqueline	03/30/2018	Pending	
<input checked="" type="checkbox"/>	APD	APD Waiver	Reed, Monica	03/27/2018	Approved	03/27/2018

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

26. In the Cost Plan List View Grid, click on the applicable Cost Plan to open it and update fields as necessary

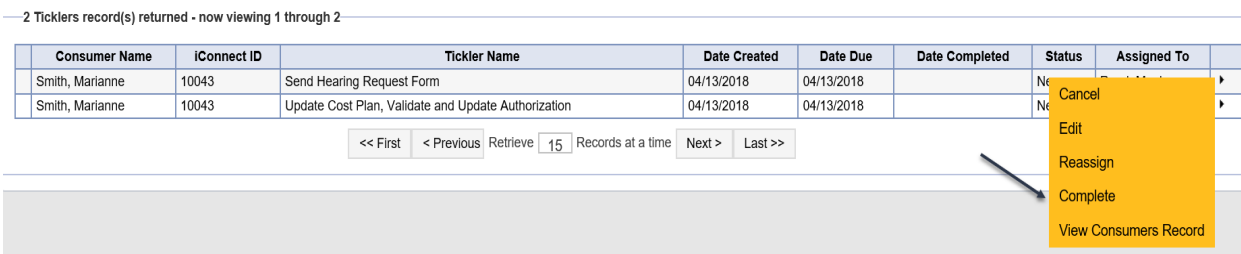
27. When finished, click **File > Save and Close Plan**

28. Hover over the arrow next to the Tickler to click **Complete**

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

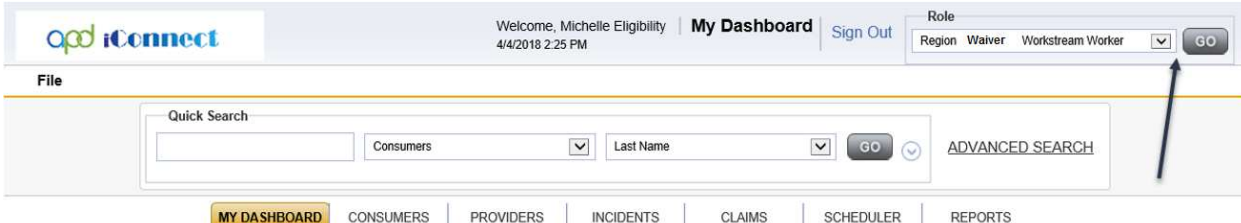
Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Send Hearing Request Form	04/13/2018	04/13/2018		Ne	
Smith, Marianne	10043	Update Cost Plan, Validate and Update Authorization	04/13/2018	04/13/2018		Ne	

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



29. The Office of Appeal Hearings will assign an Appeal Number and issue Acknowledgement of Hearing and notify APD of the number via email.

30. Upon receiving the e-mail from the Office of Appeal Hearings, the Hearing point of contact for the Region will log into iConnect and set Role = Region Waiver Workstream Worker. Click **Go**.



apd iConnect Welcome, Michelle Eligibility 4/4/2018 2:25 PM My Dashboard Sign Out Role Region Waiver Workstream Worker GO

File

Quick Search Consumers Last Name GO ADVANCED SEARCH


MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER REPORTS

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

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

- Division = APD
- Note Type = Due Process
- Note Subtype = Appeal Documents
- Status = Pending
- Route the Note to the appropriate Secondary Worker by clicking the ellipsis 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.
- Attach any collateral documentation

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


Marianne Smith | **Notes**  
4/13/2018 12:01 PM

**File**   **Tools**

---

**Notes Details**

Division \*      APD ▾  
 Note By \*        Buck, Jennifer ▾  
 Note Date \*     04/13/2018 📅  
 Program/Provider      ▾  
 Note Type \*      Due Process ▾\*  
 Note Sub-Type    Appeal Documents ▾  
 Description        
 Note              Collateral documentation attached to this Note record  
 Status \*         Pending ▾  
 Date Completed   

34. The Secondary Worker will monitor their **My Dashboard** for Note records related to Due Process Appeal Documents. To do so, log into iConnect and set Role = Pre-Enrollment or Waiver Workstream Lead. Click **Go**.

35. On the **My Dashboard**, locate the Consumers panel and scroll down to the Notes section. Click on the **Pending** link to open a queue of Notes with Status = Pending

<b>Notes</b> >	
Complete	4
Draft	1
I'm Interested	1
Pending	1
<b>Alert Notes</b> >	
Unread Alert Notes	0
<b>Ticklers</b> >	
Ticklers	52

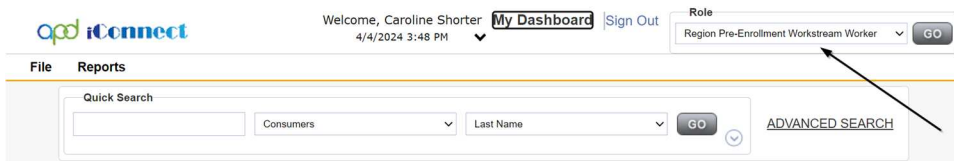
36. In the Pending Notes queue, open the Note record with Note Type = Due Process and Note Subtype = Appeal Documents.

37. Review the contents of the Note to determine if Legal Issues record can be created. Update the Note accordingly.

- a. Route the Note back to the appropriate Region Worker by clicking the ellipsis 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.
- b. Set Status = Complete

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

39. The Region Worker will monitor their **My Dashboard** for Note records related to Appeal Documents. To begin, log into iConnect and set Role = Region Pre-Enrollment Workstream Worker. Click **Go**.



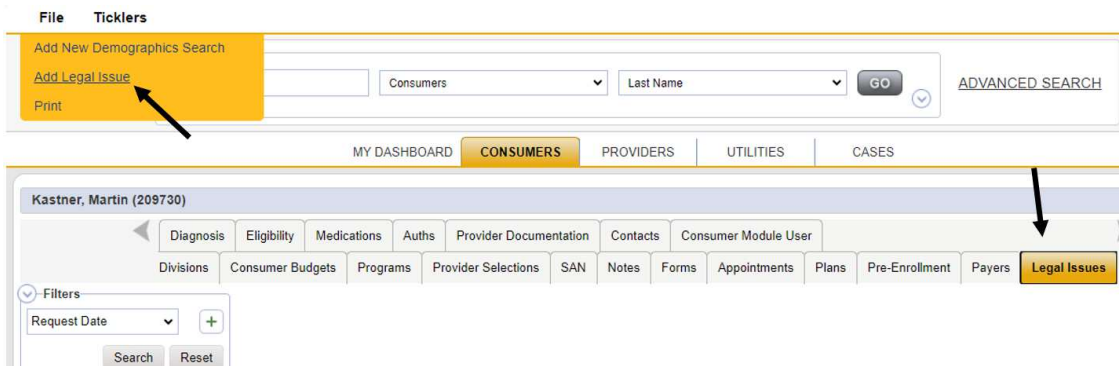
40. On the **My Dashboard**, locate the Consumers panel and scroll down to the Notes section. Click on the **Complete** link to open a queue of Notes with Status = Complete.



- a. Use the multi variable search to narrow down the search results. Open the Note record with Note Type = Due Process and Note Subtype = Appeal Documents

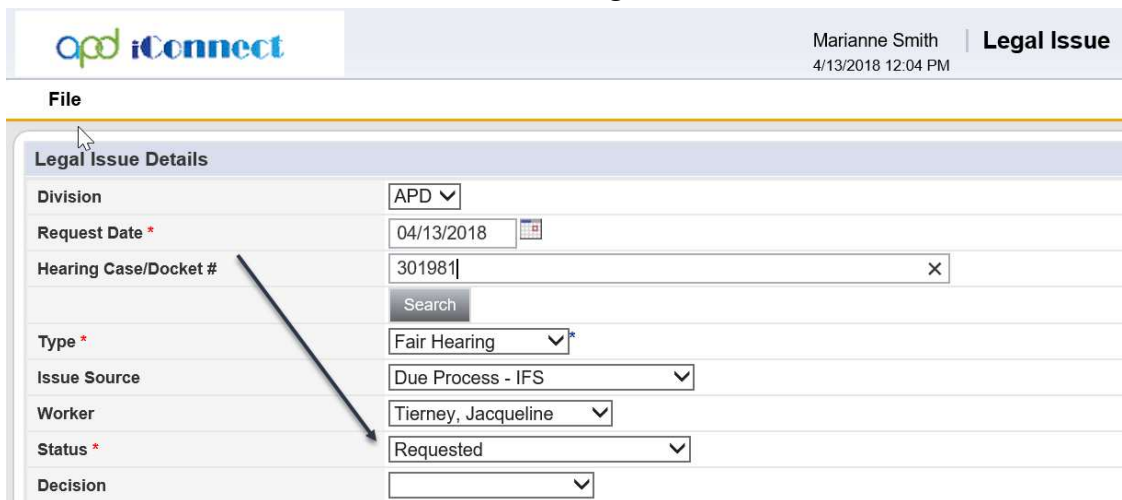
41. Review the contents of the Note. Proceed to create the Legal Issues record per the instructions below.

42. To document the Fair Hearing in the consumer's record, navigate to the **Legal Issues** tab and click **File > Add Legal Issue**.



43. In the new Legal Issue record, update the following fields:
- Request Date = Enter the date the original request was received
  - Type = Fair Hearing
  - Issue Source = what prompted Fair Hearing request
  - Status = Requested
  - Worker = Program Reviewer or Assessor

44. When finished, click **File > Save Legal Issue**



45. In the Legal Issue record, the **Hearings** tab will appear. Click on the **Hearings > File > Add Hearing**.

File

Add Hearing

- Add Hearing
- Spell Check
- Print
- Close Hearings

- Monthly View
- Daily View

Filters

Status  Not Equal To  Draft  AND

Hearing Start Date

Hearings

Court Decisions

0 record(s) returned

46. In the new Hearing record, update the following fields:

- a. Type = Fair Hearing
- b. Start Date
- c. Start Time
- d. End Date
- e. End Time
- f. Status = Scheduled

47. When finished, click **File > Save Hearing**

File

Hearing Detail

Division	APD
Program	APD Waiver <input type="button" value="Details"/>
Start Date *	04/13/2018 <input type="button" value="calendar"/>
Start Time	12 <input type="text"/> 21 <input type="text"/> PM <input type="text"/>
End Date	04/13/2018 <input type="button" value="calendar"/>
End Time	12 <input type="text"/> 51 <input type="text"/> PM <input type="text"/>
Service Code	<input type="text"/> <input type="button" value="..."/> <input type="button" value="Clear"/>
Type	Fair Hearing <input type="text"/>
Sub Type	<input type="text"/>
Description (non-HIPAA Data)	<input type="text"/>
Reason	<input type="text"/>
Appt. Summary (non-HIPAA Data)	<input type="text"/>
Appt. Details(HIPAA Data)	<input type="text"/>
Category	<input type="text"/>
Location	Consumers Home <input type="text"/>
Status *	Scheduled <input type="text"/>
High Priority	<input type="checkbox"/>

48. In the new Hearing record, Click on the **New Hearing Participant** subpage:
- Use the filters to find workers in the system who will serve as witnesses. Click on matching records and click **Add** to add them to the Hearing appointment
  - When finished, click **File > Save New Hearing Participant** and **File > Close New Hearing Participant**

49. To upload any additional supporting documents to the consumer's record, click on the **Notes** tab and click **File > Add Note**.

50. In the new Note record, update the following fields:
- Note Type = Due Process
  - Note Subtype = Evidentiary Documents
  - Status = Complete
  - Attach any additional documents

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

apd iConnect

Marianne Smith | **Notes**  
 4/13/2018 12:28 PM

File   Tools


Notes Details


Division *	APD ▼
Note By *	Buck, Jennifer ▼
Note Date *	04/13/2018
Program/Provider	APD Waiver ▼ <a href="#">Details</a>
Note Type *	Due Process ▼*
Note Sub-Type	Evidentiary Documents ▼
Description	<input style="width: 100%;" type="text"/>
Note	<div style="border: 1px solid #ccc; padding: 5px;">           -Additional documentation attached to this email          </div>
Status *	Complete ▼
Date Completed	04/13/2018

## Motion to Dismiss or Withdraw Due Process Request

1. In the event the region receives a Motion to Dismiss or Withdraw, the document(s) will need to be attached to a Note. To do so, the Region Worker will navigate to the consumer's record and click on **Notes > File > Add Note**.
2. In the new Note record, update the following fields:
  - a. Division = APD
  - b. Note Type = Due Process
  - c. Note Subtype = Collateral Documents
  - d. Status = Complete
3. Attach all relevant documentation.
4. When finished, click **File > Save and Close Note**

File Tools

Notes Details	
Division *	APD ▼
Note By *	Buck, Jennifer ▼
Note Date *	04/13/2018 
Program/Provider	APD Waiver ▼ <a href="#">Details</a>
Note Type *	Due Process ▼*
Note Sub-Type	Collateral Documents ▼
Description	<input type="text"/>
Note	Collateral documents attached to this email
Status *	Complete ▼
Date Completed	04/13/2018



5. On the consumer's record, navigate to the **Legal Issues** tab and click **File > Add Legal Issues**:

File Ticklers

Add New Demographics Search

Add Legal Issue

Print

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

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

Filters

Request Date

Search Reset

6. In the new Legal Issue record, update the following fields:
  - a. Request Date = Update as appropriate
  - b. Type = Fair Hearing
  - c. Issue Source = what prompted Fair Hearing request
  - d. Status = Request for Motion to Withdraw OR Request for Motion to Dismiss
  - e. Worker = Program Reviewer or Assessor

7. When finished, click **File > Save Legal Issue**

opd iConnect

Marianne Smith | Legal Issue

4/13/2018 12:38 PM

File

Legal Issue Details

Division APD

Request Date \* 04/13/2018

Hearing Case/Docket # 43534

Search

Type \* Fair Hearing

Issue Source Due Process - Cost Plan Review

Worker Tierney, Jacqueline

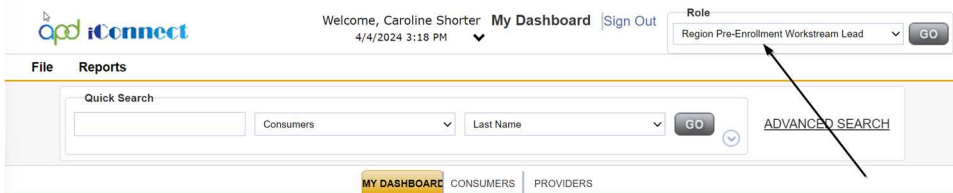
Status \* Request for Motion to Withdraw

Decision

8. Upon saving the Legal Issue record, a Workflow Wizard will trigger with the following Ticklers:
  - a. Update Cost Plan, Validate and Update Authorization - *Assigned to Primary Worker (Waiver Support Coordinator)*
  - b. Update Budget - *Assigned to Secondary Worker (Pre-Enrollment or Waiver Workstream Lead)*, who will complete the task or reassign to the appropriate designee with the Budget Entry role. Pre-Enrollment Workstream leads will cancel this tickler.

c. Update Legal Issue Status - *Assigned to Secondary Worker (Pre-Enrollment or Waiver Workstream Lead)*, Due Immediately

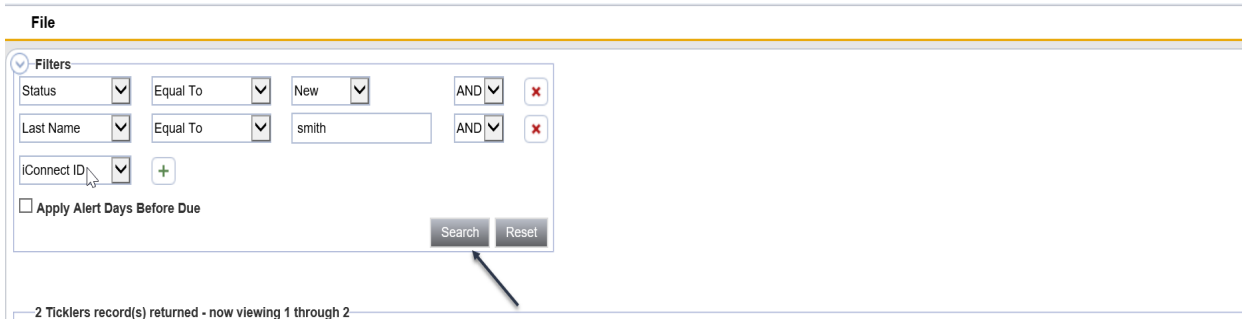
9. The Region Staff (Secondary Worker), will monitor their **My Dashboard** for Ticklers related to Due Process. To begin, log into iConnect and set Role = Region Waiver Workstream Lead. Click **Go**.



10. On the **My Dashboard**, find the Consumers Section and scroll down to the Ticklers Panel. Click on **Ticklers Due** to access the Tickler Queue:



a. Use the multi variable search to narrow down the results in the Tickler Queue. Click **Search**.

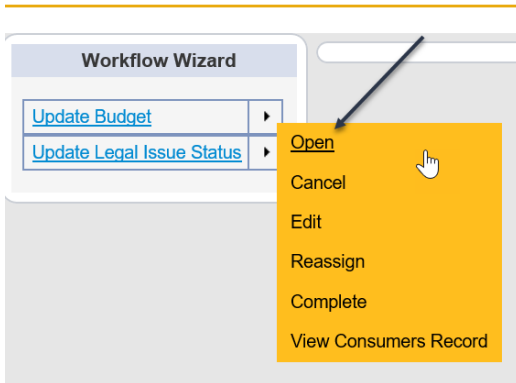


### Tip

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

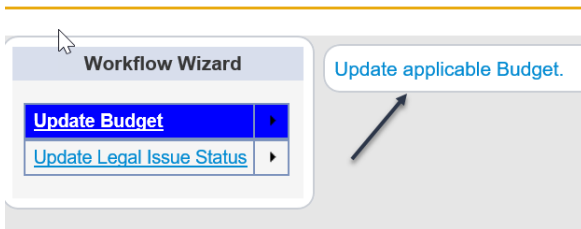
11. Select the tickler, called Update Budget to Open it.

**File**



12. Upon doing so a Message Tickler will open that says Update Applicable Budget

**File**

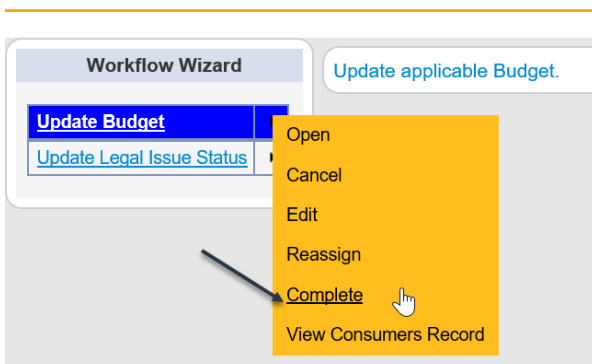


- a. Note that the Budget only needs to be updated if Due Process was initiated because of an Agency action regarding waiver services. If this is not the case, hover over the arrow next to the Tickler to click **Cancel**.
- b. If the Due Process request was initiated because of an Agency action regarding waiver services, update the Budget.

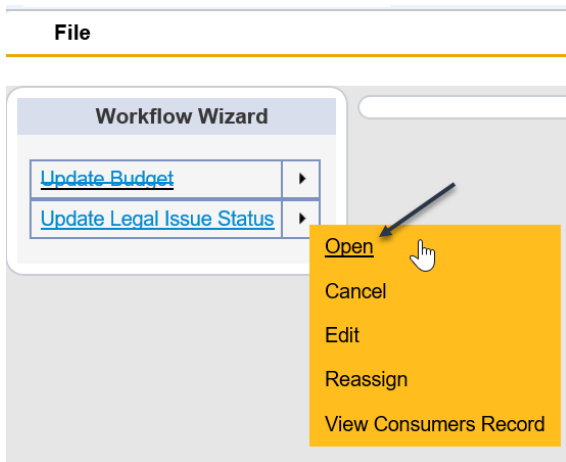
13. To do so, navigate to the consumer's record and click on the **Consumer Budget** tab > open the appropriate Budget and update it accordingly. [See Chapter 9 | Consumer Budget](#)

14. Back in the Workflow Wizard window, hover over the arrow next to the Tickler to click **Complete**

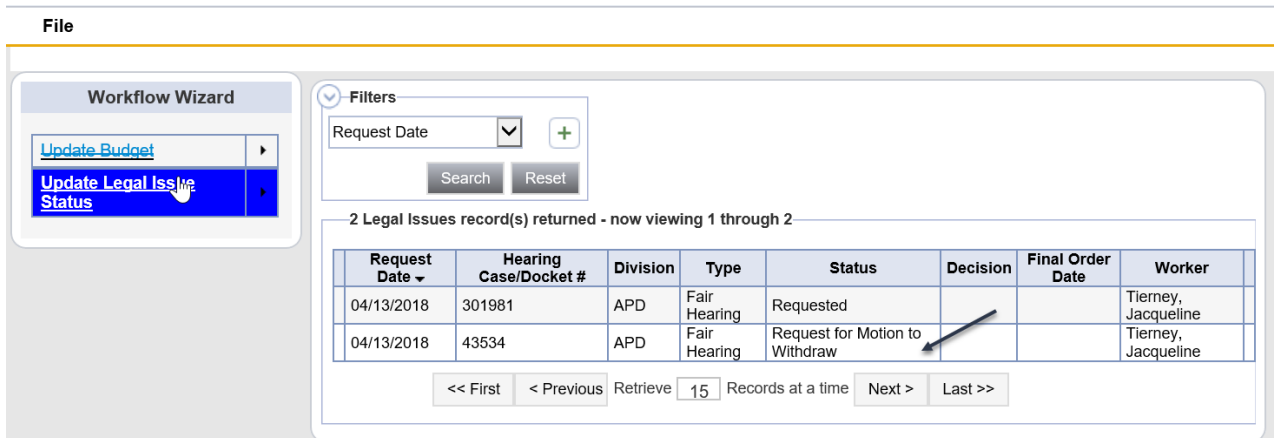
**File**



15. In the Tickler queue, hover over the arrow next to the Tickler Update Legal Issue Status to click **Open**.



16. Upon doing so, the Legal Issues List View Grid will open



17. In the consumer's Legal Issues List View grid, click to open the relevant Legal Issue and update the Status and other fields as applicable.

18. When finished, click **File > Save and Close Legal Issue**

19. Back in the Workflow Wizard window, hover over the arrow next to the Tickler to click **Complete**

20. Click **File > Close Workflow Wizard**

21. The Waiver Support Coordinator will monitor their **My Dashboard** for Ticklers related to Due Process. To begin, log into iConnect and set Role = WSC/CDC. Click **Go**.

22. On the **My Dashboard**, find the Consumers Section and scroll down to the Ticklers Panel. Click on **Ticklers Due** to access the Tickler Queue:

a. Use the multi variable search to narrow down the results in the Tickler Queue. Click **Search**.

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Update Cost Plan, Validate and Update Authorization	04/13/2018	04/13/2018		New	Reed, Monica



**Tip**

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

23. Click on the Tickler called Update Cost Plan, Validate and Update Authorization to open it.

24. Upon doing so, the consumer's Cost Plan List View Grid will open

The screenshot shows the iConnect interface. At the top left is the 'opd iConnect' logo. At the top right, the user is identified as 'Marianne Smith' and the page is titled 'Plans' with a timestamp of '4/13/2018 1:01 PM'. Below the header is a 'File' menu. On the left side, there is a 'Workflow Wizard' panel with a blue button that reads 'Update Cost Plan, Validate and Update Authorization'. The main area contains a 'Filters' section with a 'Division' dropdown menu and 'Search' and 'Reset' buttons. Below the filters, it states '3 Plans record(s) returned - now viewing 1 through 3'. The 'Cost Plan List View Grid' is a table with the following data:

+	Division	Program	Worker	Cost Plan Creation Date	Status	Cost Plan Begin Date
+	APD	CDC+	Tierney, Jacqueline	04/09/2018	Draft	04/09/2018
	APD		Tierney, Jacqueline	03/30/2018	Pending	
+	APD	APD Waiver	Reed, Monica	03/27/2018	Approved	03/27/2018

At the bottom of the grid, there are navigation buttons: '<< First', '< Previous', 'Retrieve 15 Records at a time', 'Next >', and 'Last >>'.

25. In the Cost Plan List View Grid, click on the applicable Cost Plan to open it and update fields as necessary

26. When finished, click **File > Save and Close Plan** and **File > Close Workflow Wizard**

### Fair Hearing

1. When the assigned Workstream Worker or Workstream Lead receives a copy of the Final Order issued in response to the Due Process request, the worker will document via note and attach a copy of the Final Order. To begin, the worker will log into iConnect and set Role Region Waiver Workstream Worker or Lead. Click **Go**.
2. To provide all necessary parties with the Final Order, navigate to the consumer's record and click **Notes > File > Add Note**.
3. In the new Note record, update the following fields:
  - a. Note Type = Due Process
  - b. Note Subtype = Final Order
  - c. Status = Complete
  - d. Attach the Final Order to the Note
  - e. Route the Note to the appropriate recipients (ROM DROM, Waiver Work Stream Lead) by clicking the **Ellipsis** 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.

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

The screenshot shows the 'Notes Details' form in the iConnect system. The form is structured as follows:

Division *	APD
Note By *	Tierney, Jacqueline
Note Date *	04/23/2018
Program/Provider	APD Waiver <a href="#">Details</a>
Note Type *	Due Process
Note Sub-Type	Final Order
Description	
Note	Please review Final Order attached to this Note.
Status *	Complete
Date Completed	04/23/2018

5. Upon saving the Note record, a Workflow Wizard will trigger with the following Ticklers:

- a. Run the Algorithm, Update Budget, and Hearing Status - *Assigned to the Secondary Worker, (WL or Waiver Workstream Lead) Due Immediately*
- b. Contact Consumer/Consumer Rep – *Assigned to the Primary Worker, Due Immediately*
- c. Document Consumer Decision - *Assigned to the Primary Worker, Due Immediately*
- d. Update Planned Services and Auths - *Assigned to the Primary Worker, Due Immediately*
- e. Create/Update Service Authorizations - *Assigned to the Primary Worker, Due Immediately*
- f. Contact Service Providers - *Assigned to the Primary Worker, Due Immediately*

- To complete the first Tickler, the Secondary Worker (Pre-Enrollment or Waiver Workstream Lead) will log into iConnect and set Role = Pre-Enrollment or Waiver Workstream Lead). Click **Go**.
- On the **My Dashboard**, finding the consumer's section and scrolling down to the Ticklers Panel. Click on the **Ticklers** link:

- In the Tickler Queue, use the multi variable search to narrow the results down to the relevant Ticklers. Click **Search**.

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Update Cost Plan, Validate and Update Authorization	04/13/2018	04/13/2018		New	Reed, Monica
Smith, Marianne	10043	Contact Consumer/Legal Rep	04/23/2018	04/23/2018		New	Reed, Monica
Smith, Marianne	10043	Document Consumer Decision	04/23/2018	04/23/2018		New	Reed, Monica
Smith, Marianne	10043	Update Planned Services and Auths	04/23/2018	04/23/2018		New	Reed, Monica
Smith, Marianne	10043	Contact Service Providers	04/23/2018	04/23/2018		New	Reed, Monica



### Tip

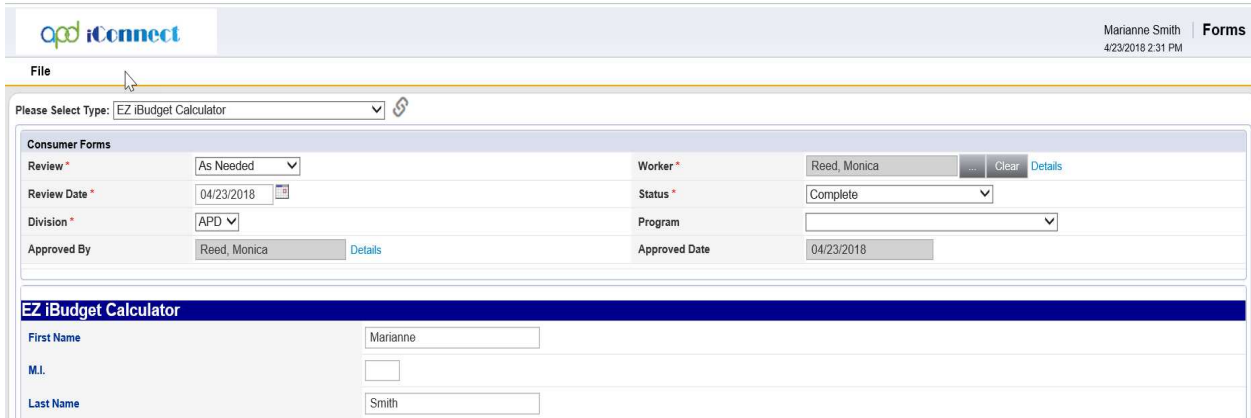
*When searching for a future Tickler, remember to clear the check box next to **Apply Alert Days Before Due** prior to clicking **Search**.*

- In the Tickler Queue, click to open the Tickler called Run Algorithm, Update Budget and Hearing Status.
- Upon doing so, a Message Tickler will open - Run Algorithm, Update Budget and Hearing Status  
NOTE: Running the algorithm is rare when receiving a final order. If this is not needed, Cancel the tickler.

10. To complete the Tickler, begin by navigating to the consumer's record and click on **Forms > File > Add Form**.

- a. Set Please Select Type = EZ iBudget Calculator.
- b. Complete all relevant fields

11. When finished, click **File > Save and Close Form**



File

Please Select Type: EZ iBudget Calculator

**Consumer Forms**

Review \* As Needed Worker \* Reed, Monica Clear Details

Review Date \* 04/23/2018 Status \* Complete

Division \* APD Program

Approved By Reed, Monica Details Approved Date 04/23/2018

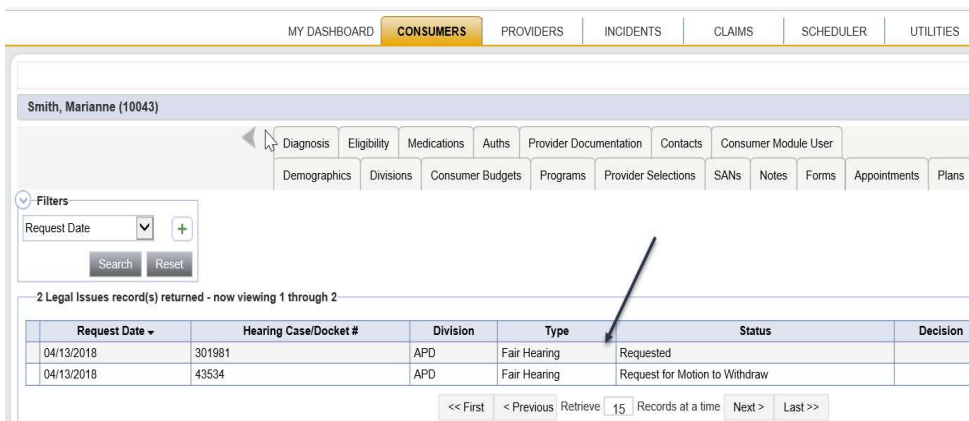
**EZ iBudget Calculator**

First Name Marianne

M.I.

Last Name Smith

12. Navigate to the consumer's record, click on the **Legal Issues** tab > click to open the relevant Legal Issue record > click on the **Hearings** tab > click to open the relevant Hearing record



MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER UTILITIES

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

Request Date Search Reset

2 Legal Issues record(s) returned - now viewing 1 through 2

Request Date	Hearing Case/Docket #	Division	Type	Status	Decision
04/13/2018	301981	APD	Fair Hearing	Requested	
04/13/2018	43534	APD	Fair Hearing	Request for Motion to Withdraw	

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

13. Update the Status field

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

15. Back in the Tickler Queue, hover over the arrow next to the Tickler to click **Complete**

16. To complete the remaining Ticklers, the Primary Worker (Waiver Support Coordinator) will log into iConnect and set Role = WSC/CDC. Click **Go**.

17. On the **My Dashboard**, finding the consumer's section and scrolling down to the Ticklers Panel. Click on the **Ticklers** link:

The screenshot shows a vertical list of dashboard widgets. The 'Ticklers' widget is highlighted with a mouse cursor and an arrow pointing to it. The widgets are: Alert Notes (Unread Alert Notes: 0), Ticklers (50), Appointments (Scheduled: 4), and Authorizations (Approved: 11, Terminated: 3).

a. In the Tickler Queue, use the multi variable search to narrow the results down to the relevant Ticklers. Click **Search**.

The screenshot shows the search interface for the Tickler Queue. It includes a 'Filters' section with dropdowns for Status, Last Name, and iConnect ID, and a checkbox for 'Apply Alert Days Before Due'. Below the search filters is a table with 5 records. The table has columns for Consumer Name, iConnect ID, Tickler Name, Date Created, Date Due, Date Completed, Status, and Assigned To. The records are for Marianne Smith with various tickler names.

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Update Cost Plan, Validate and Update Authorization	04/13/2018	04/13/2018		New	Reed, Monica
Smith, Marianne	10043	Contact Consumer/Legal Rep	04/23/2018	04/23/2018		New	Reed, Monica
Smith, Marianne	10043	Document Consumer Decision	04/23/2018	04/23/2018		New	Reed, Monica
Smith, Marianne	10043	Update Planned Services and Auths	04/23/2018	04/23/2018		New	Reed, Monica
Smith, Marianne	10043	Contact Service Providers	04/23/2018	04/23/2018		New	Reed, Monica

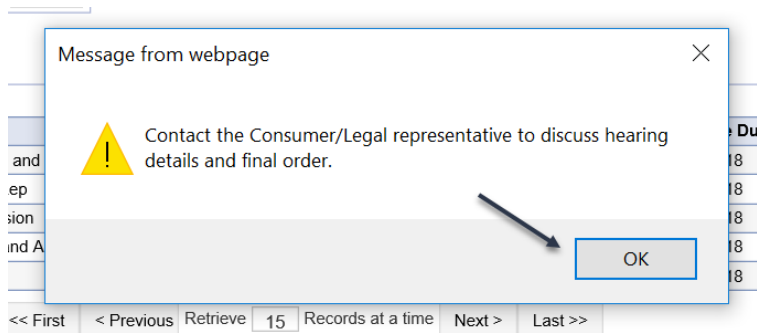


**Tip**

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

18. In the Tickler Queue, click to open the Tickler called Contact Consumer/Legal Rep.

19. Upon doing so, a Message Tickler will open - Contact Consumer/Legal Representative to discuss hearing details and final order. Click **OK**.



20. When finished, hover over the arrow next to the Tickler to click **Complete**

5 Ticklers record(s) returned - now viewing 1 through 5

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Update Cost Plan, Validate and Update Authorization	04/13/2018	04/13/2018		New	Reed, Monica
Smith, Marianne	10043	Contact Consumer/Legal Rep	04/23/2018	04/23/2018		New	<ul style="list-style-type: none"> <li>Cancel</li> <li>Edit</li> <li>Reassign</li> <li>Complete</li> <li>View Consumers Record</li> </ul>
Smith, Marianne	10043	Document Consumer Decision	04/23/2018	04/23/2018		New	
Smith, Marianne	10043	Update Planned Services and Auths	04/23/2018	04/23/2018		New	
Smith, Marianne	10043	Contact Service Providers	04/23/2018	04/23/2018		New	

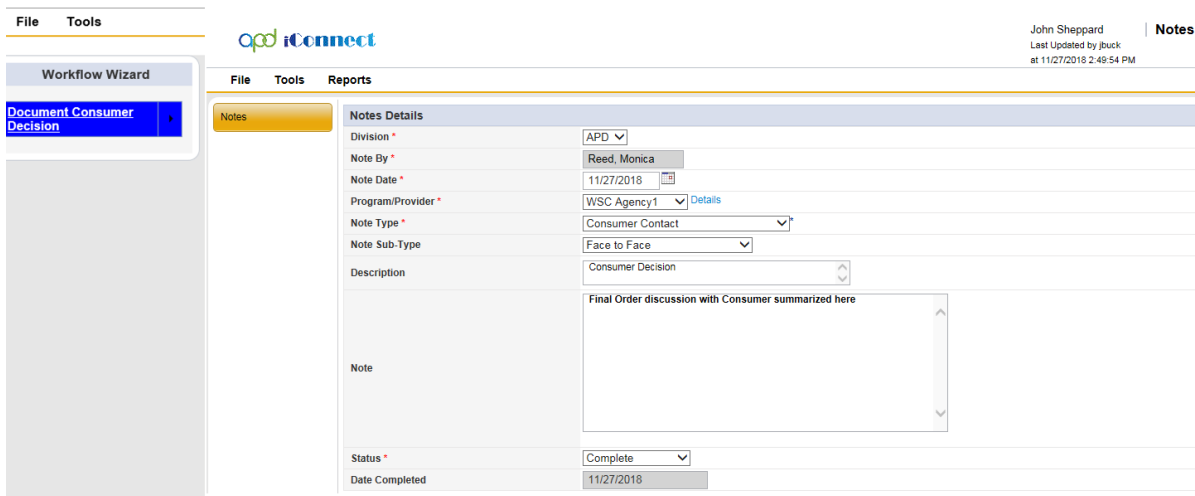
<< First < Previous Retrieve 15 Records at a time Next > Last >>

21. Back in the Tickler Queue, click to open the Tickler called Document Consumer Decision.

22. Upon doing so, a new Consumer Note record will open. In the new Consumer Note record, update the following fields:

- a. Division = APD
- b. Note Type = Due Process
- c. Note Subtype = Consumer Update
- d. Description = Consumer Decision
- e. Note = summarize the discussion with the consumer/legal representative explain the impact of the Final Order. If the consumer doesn't agree with the Final order, he/she can take the necessary steps to have a judicial review.
- f. Status = Complete

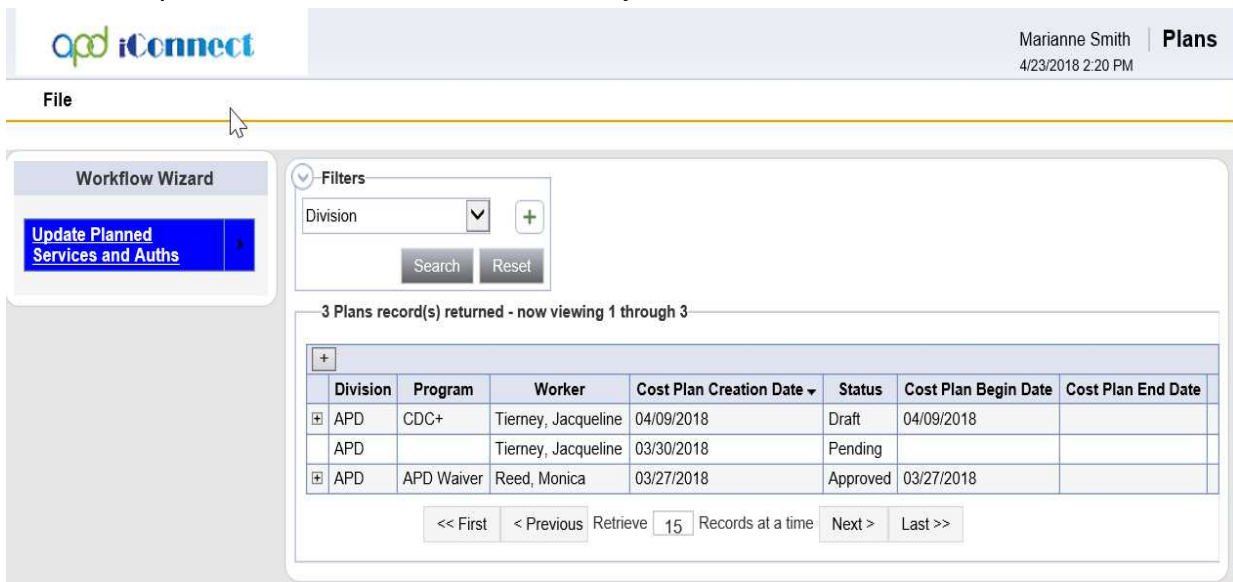
23. When finished, click **File > Save Notes** and **File > Close Workflow Wizard**



24. Back in the Tickler Queue, click to open the Tickler Update Planned Services and Auths.

25. Upon doing so, the consumer's Cost Plan List View Grid will open.

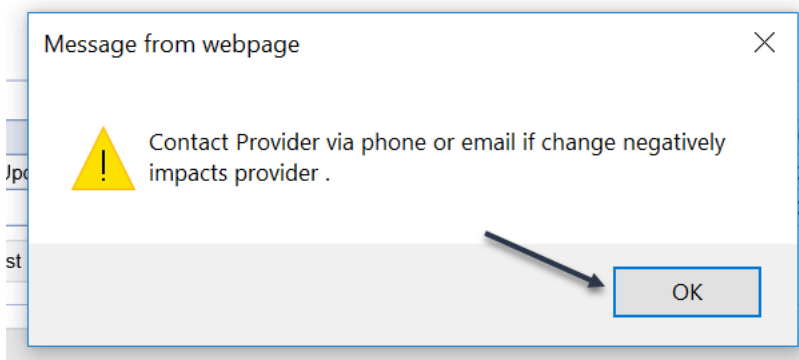
26. In the consumer's Cost Plan List View Grid, click on the relevant Cost Plan to view it. Update the Cost Plan as necessary.



27. When finished, click **File > Save and Close Plan** and **File > Close Workflow Wizard**

28. Back in the Tickler Queue, click to open the Tickler called Contact Service Providers

29. Upon doing so, a Message Tickler opens - Contact Provider via phone or email if change negatively impacts Provider



30. When finished, hover over the arrow next to the Tickler to click **Complete**

31. If the Consumer doesn't agree with the Final Order, he/she can take necessary steps to request a Judicial Review (non-iConnect process).