

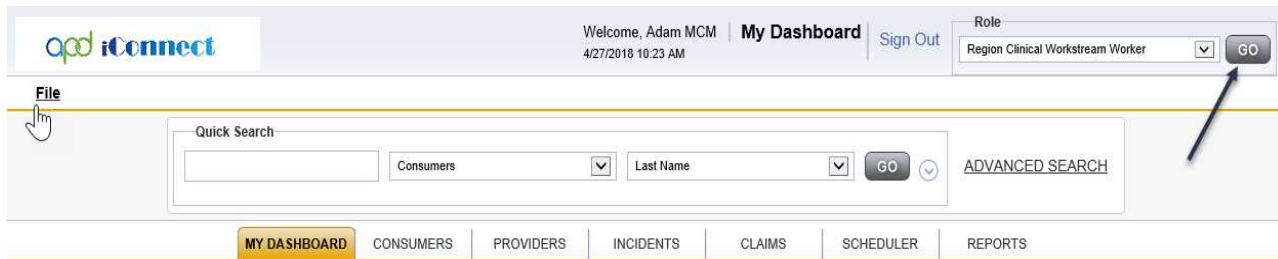
## Chapter 19 | Death Reporting

### Introduction

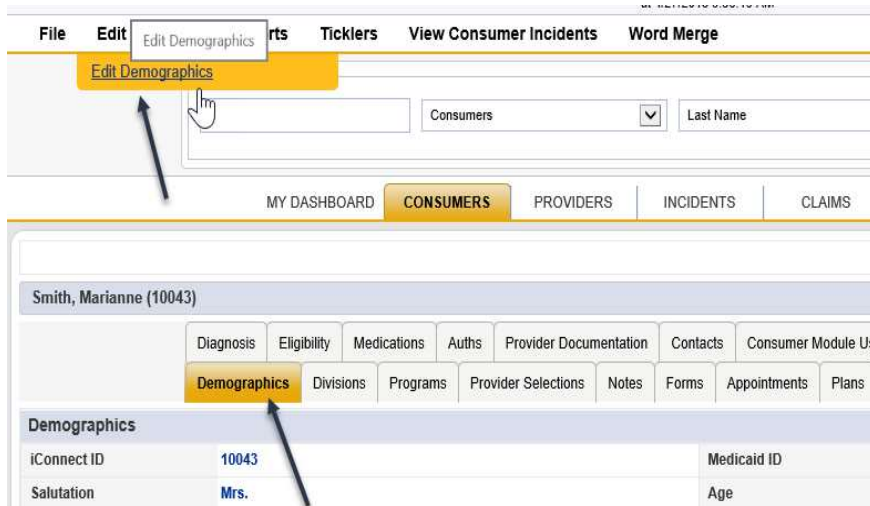
This chapter covers the end-to-end process for recording a Consumer death in iConnect. Monthly, Department of Health (DOH) Consumer data will be imported into iConnect to populate data fields on matching Consumer records. If a Consumer death has occurred and is recorded in the DOH data, the Date of Death, the DOD File Number, and the Cause of Death fields will be updated on the consumer's Demographics records in iConnect.

### Date of Death – Manual Entry

1. Upon receiving notification of a Consumer death, the Medical Case Manager (MCM) will update the consumer's Demographic record. To begin, log into iConnect and set Role = Region Clinical Workstream Worker. Click **Go**.



2. Search for and select the consumer's record and click on the **Demographics** tab > select **Edit** > **Edit Demographics**.



3. Update the following fields.
  - a. Date of Death = update to correct date of death based on research found

- b. Vital Statistics Cause of Death = enter if known.
- c. DOD File Number = (If known. Otherwise, the field will be auto populated during the monthly scheduled interface job with DOH).

The screenshot shows the 'iConnect' interface for 'Demographics'. The user is 'John Sheppard', last updated by 'j buck' on 6/29/2018 at 4:24:02 PM. The form is titled 'Basic Demographics' and includes the following fields:

- Salutation: [Dropdown]
- Last Name \*: Sheppard
- First Name \*: John
- Consumer Photo: [Image]
- Middle Name: [Text] (900 characters remaining)
- Suffix: [Dropdown]
- Alias: [Text]
- Title: [Text]
- Date of Birth \*: 12/31/1970
- Age: 47.5
- Date of Death: [Text] (indicated by an arrow)
- DOD Action: [Dropdown]
- DOD File Number: [Text] (indicated by an arrow)
- Vital Statistics Cause of Death: [Text] (indicated by an arrow, 1000 characters remaining)
- Gender \*: Male
- Race: [Dropdown]
- Ethnicity: [Dropdown]
- Suspected Developmental Disability: [List] (Autism, Cerebral Palsy, Intellectual Disability, Unknown, Prader-Willi Syndrome, Spina Bifida, Down Syndrome)
- Competency \*: [Dropdown]
- Marital Status: [Dropdown]
- Living Setting: [Dropdown]
- Referral Source: [Dropdown]

4. Select **File > Save and Close Demographics**

5. Upon saving the consumer's Demographic record with a Date of Death, a Workflow Wizard will trigger the following Ticklers:

- a. Complete ROD – *Assigned to Self (MCM)*, Due Immediately. If anyone other than the MCM should update the DOD, he/she should reassign the tickler to the Clinical Lead for reassignment to the correct MCM.
- b. Create Alert Note notifying all that the ROD is in Process – *Assigned to Self (MCM)*, Due Immediately. If anyone other than the MCM should update the

DOD, he/she should reassign the tickler to the Clinical Lead for reassignment to the correct MCM.

### Report of Death Form & Alert Note

1. The Date of Death was just added to the Demographic record and a Workflow Wizard triggers for the MCM (Self.) Click the tickler called Complete ROD.
2. Upon doing so, a new ROD Report of Death form will open. Complete all relevant fields including:
  - a. Review = Other
  - b. Status = Pending
  - c. Fill out ROD form in its entirety
3. When finished, click **File > Save Forms**
4. After the MCM creates the ROD with Status = Pending, a supervisor must review the report as described in the [Supervisor review of ROD](#) section.

The screenshot shows a web-based form for reporting a death. At the top, there is a 'File' menu and a dropdown for 'Please Select Type: ROD Report of Death Form'. Below this is a 'Consumer Forms' section with several input fields: 'Review \*' (Initial), 'Review Date \*' (04/27/2018), 'Division \*' (APD), 'Worker \*' (Tierney, Jacqueline), 'Status \*' (Pending), and 'Program' (APD Waiver). There are also 'Approved By' and 'Approved Date' fields. A blue bar with white text reads 'REPORTING OF DEATH'. Below that is a green bar with white text reading 'CONSUMER INFORMATION'. Under this bar, there are three rows of information: 'Name of Consumer: Marianne Smith', 'Date of Death: 04/27/2018', and 'Suspected Cause of Death: Natural Causes'. An arrow points to the 'Status \*' dropdown menu.

5. The MCM will return to the Workflow Wizard and select the Create Alert Note notifying all that the ROD is in Process tickler.
6. Upon doing so, a new Consumer Note record opens. Update the following fields:
  - a. Division = APD
  - b. Note Type = Report of Death
  - c. Note Subtype = N/A
  - d. **Description = OPEN ROD – DO NOT CLOSE DIVISION**

- e. Note = Indicate that the ROD is in process
- f. Status = Alert



**Remember:**

**DO NOT UPDATE THE STATUS OF THIS ALERT NOTE.**

*Only State Office staff should change the status of this note to Complete.*

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

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

- Division \* : APD
- Note By \* : MCM, Adam
- Note Date \* : 04/27/2018
- Program/Provider : [Empty]
- Note Type \* : Report of Death
- Note Sub-Type : [Empty]
- Description : [Empty]
- Note : This Consumer's ROD is in progress
- Status \* : Alert
- Date Completed : [Empty]

- 8. The Supervisor review of the ROD is completed next.

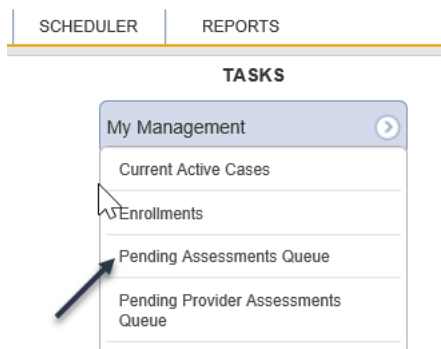
### Supervisor Review of ROD

- 1. After the MCM creates the ROD with Status = Pending, a supervisor must review the report. Supervisors are defined on the Worker's record in iConnect and are added as part of APD's user provisioning process.
- 2. iConnect will route the Pending ROD to the Supervisor of the MCM that completed the ROD form. The Supervisor will access the Pending Assessments Queue to view the ROD

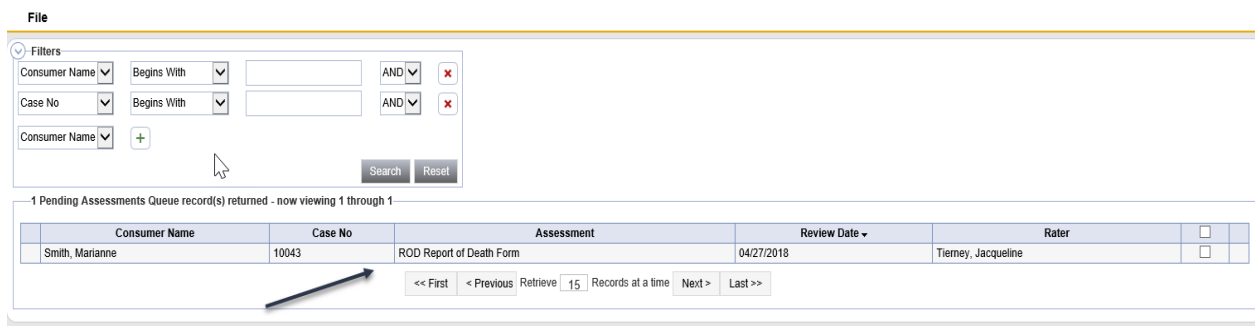
- The MCM Supervisor will review all ROD's completed by the MCM.
- To begin, the Medical Case Manager Supervisor will log into iConnect and set Role = Region Clinical Workstream Lead. Click **Go**.




- On the **My Dashboard**, find the Tasks Section and scroll down to the My Management Panel. Click on the **Pending Assessments Queue** link:



- In the Pending Assessments Queue, click to open the form called Report of Death Form to review the form.




- If all required information is noted, set Status = Submitted and click **File > Save and Close Forms**.


Marianne Smith  
Last Updated by jleimey  
at 4/27/2018 11:28:58 AM
Forms

File Reports

**ROD Report of Death Form**

Consumer Forms					
Review *	Initial	Worker *	Tierney, Jacqueline	Clear	Details
Review Date *	04/27/2018	Status *	Submitted		
Division *	APD	Program	APD Waiver		Details
Approved By	Tierney, Jacqueline	Approved Date	04/27/2018		
Note					

**REPORTING OF DEATH**

**CONSUMER INFORMATION**

8. Should the MCM Supervisor find that the form is incomplete, or requires additional attention by the sending MCM, he or she can make changes to the form and/or will notify the MCM via a new Consumer Note record.

9. To add the Note, navigate to the consumer's record and click **Notes > File > Add Note.**


10. In the new Note, update the following fields:

- a. Division = APD
- b. Note Type = Report of Death
- c. Note = Indicate which portions of the Form are incomplete
- d. Status = Pending
- e. Route the Note to the MCM 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.

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

12. Repeat the review cycle (adding relevant changes to the existing Report of Death form) until the ROD form updates have been complete.


13. When all required information is noted on the Report of Death Form, MCM / MCM Supervisor will update Status = Submitted and click **File > Save and Close Forms.**


Marianne Smith | **Notes**  
5/1/2018 9:42 AM

File Tools

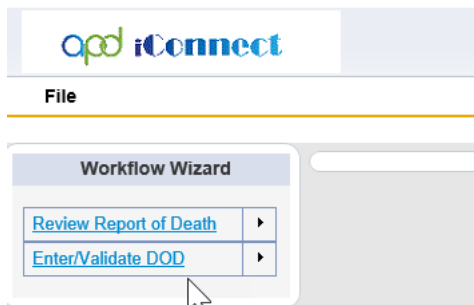
---

**Notes Details**

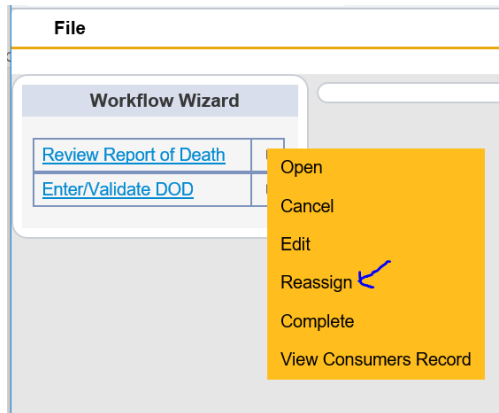
Division *	APD ▼
Note By *	Tierney, Jacqueline ▼
Note Date *	05/01/2018 
Program/Provider	▼
Note Type *	Report of Death ▼*
Note Sub-Type	▼
Description	▼
Note	-X and Y are missing from the Report of Death Form. Please update the Form accordingly and resubmit for approval
Status *	Pending ▼
Date Completed	

## Reassign Ticklers

1. Upon saving the Report of Death Form with Status = Submitted, a Workflow Wizard will trigger the following Ticklers:
  - a. Review Report of Death – *Assigned to Self but Reassign to State Office Nurse, Due Immediately*
  - b. Enter/Validate DOD – *Assigned to Self but Reassign to State Office Nurse, Due Immediately*



2. In the Workflow Wizard window, hover over the arrow next to each Tickler and click **Reassign**.



3. In the Reassign Search window, type in the name of the State Office Nurse and click **Search**. Click on the matching record to send the Tickler to that user. The user will be able to access the reassigned Tickler via their **My Dashboard**.
4. A tickler can on be assigned to one user at a time. If additional users need to review the Report of Death, the State Office Nurse can reassign to that user after his/her review is complete.

### Review Report of Death

1. The State Office Nurse will monitor the **My Dashboard** for Ticklers related to Reports of Death. To begin, log into iConnect and set Role = State Office Worker. Click **Go**.
2. On the **My Dashboard**, finding the consumer's section and scrolling down to the Ticklers Panel. Click on the **Ticklers** link:

Alert Notes		>
Unread Alert Notes		0
Ticklers		>
Ticklers		50
Appointments		>
Scheduled		4
Authorizations		>
Approved		11
Terminated		3

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

- In the Tickler Queue, click to open the Tickler called **Review Report of Death**. Upon doing so, the consumer's Forms List View grid will open.
- Click to open the Report of Death Form and review it for completion.
  - Update the Vital Statistics Cause of Death field if necessary. This field should update automatically on the Demographics page from the DOH interface.
  - Change the status from Submitted to Complete. Do not mark the status as complete unless the Vital Statistics Cause of Death exists.
- When finished, click **File > Save and Close Forms**.
- When the ROD status has been changed to Complete, open ROD Note and update the following fields:
  - Description = ROD COMPLETE- DIVISION MAY BE CLOSED

- b. Note = ROD COMPLETE (this can only be done by entering in New Text field and clicking “Append Text to Note)
- c. Recipients = Primary and Secondary workers listed in the Division Tab
- d. Status = Complete

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

9. Return to the Workflow Wizard, select the flyout menu to the right of the Review Report of Death tickler and select **Complete.**

10. If the Vital Statistics Cause of Death does not yet exist, do not mark the tickler as complete so it will remain in the tickler list as a reminder to the user to complete at a later date.

11. Back in the Tickler queue, click to open the Tickler called **Enter/Validate DOD.** Upon doing so, the consumer’s Demographics record will open.

- a. Ensure that the Date of Death field has populated with the correct date. If changes need to be made, click **Edit > Edit Demographics,** update the relevant fields, and click **File > Save and Close Demographics.**

12. When finished, hover over the arrow next to the Tickler to click **Complete.** Then click **File > Close Workflow Wizard.**

The screenshot shows the iConnect software interface. At the top left is the iConnect logo. At the top right, it displays the user name 'Marianne Smith' and the last update information: 'Last Updated by jtierney at 4/27/2018 11:27:36 AM'. Below the logo is a navigation bar with 'File', 'Edit', 'Tools', 'Reports', and 'Word Merge'. On the left side, there is a 'Workflow Wizard' sidebar with a button labeled 'Enter/Validate DOD'. The main area displays a 'Demographics' record for Marianne Smith. A mouse cursor is hovering over a small arrow icon next to the 'Written Language' field.

Demographics	
iConnect ID	10043
Salutation	Mrs.
Last Name	Smith
First Name	Marianne
Consumer Photo	
Middle Name	
Alias	
Medicaid Enrolled	No
Date of Birth	3/4/2004
Date of Death	4/27/2018
Status	Active
SSN	XXX-XX-4005
Gender	Female
Medicaid ID	
Age	14.1
Race	African American
Ethnicity	Cambodia
Marital Status	Married
Living Setting	Family Safety & Preservation Commitm Facility
Written Language	Central Yupik
Spoken Language	Croatian
Legal County	
ABC PIN	
Last accessed by	126
Demographics Verified On	

## Update Division Record

1. When the Report of Death Screen Design is saved by the MCM with Status = Submitted, a Workflow Wizard Triggers the following tickler.
  - a. ROD – Division Disposition Review - For Waiver Consumers, update disposition to Pending Disenrollment for all others, cancel the ticker and proceed to the case closure process. – *Assigned to Primary Worker (Pre-Enrollment or Waiver Support Coordinator) Due Immediately*
2. The Primary Worker (Pre-Enrollment or Waiver Support Coordinator) will monitor their **My Dashboard** for Ticklers related to the ROD. To begin, log into iConnect and set Role = WSC/CDC. Click **Go**.

Quick Search

Consumers Last Name GO

Participating

ADVANCED SEARCH

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER

3. 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**.

apd iConnect Welcome, Monica Reed | Ticklers  
12/13/2019 12:20 PM

**File**

Filters  
 Status  Equal To  New  AND  X  
 iConnect ID  +  
 Apply Alert Days Before Due  
 Search Reset

192 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, John	10106	ROD_Division Disposition Review	12/13/2019	12/13/2019		New	Reed, Monica
Sheppard, John	10106	Review Cost Plan and Run AIM Output Report	11/25/2019	12/25/2019		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, find the Tickler called ROD-Division Disposition Review. Select the ticker to open. Upon doing so, the consumer's Division List View Grid will open.

apd iConnect John Sheppard | Divisions  
12/13/2019 12:23 PM

**File**

**Workflow Wizard**  
 For Waiver Consumers, update disposition to "Pending Disenrollment" for all others, cancel the ticker and proceed to the case closure process.  
 ROD\_Division Disposition Review

Filters  
 Disposition  Not Equal To  Closed  AND  X  
 Open Date  Greater Than   AND  X  
 Division  +  
 Search Reset

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		497
APD	APD Eligible - ICF/SNF Transition	Reed, Monica	Buck, Jennifer	05/23/2018		569

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

- Click to open the APD Division record. In the record, update the following fields:
  - Disposition = Pending Disenrollment
- When finished, click **File > Save Division**.

File Word Merge

Division

**Events**

Divison \* APD

Disposition \* Pending Disenrollment

Disposition Date 04/27/2018

Open Date 04/04/2018

Data Entry Date 03/21/2018

Primary Worker \* Reed, Monica ... Clear [Details](#)

Secondary Worker Tierney, Jacqueline ... Clear [Details](#)

Application Received Date \* 04/04/2018

Interested in ICF/IID Yes

Age Category at Time of Application \* Under 6

- Return to the open tickler window. From the tickler flyout menu, select **Complete**.

apd iConnect John Sheppard | Divisions  
12/13/2019 12:38 PM

File

**Workflow Wizard**

For Waiver Consumers, update disposition to "Pending Disenrollment" for all others, cancel the tickler and proceed to the case closure process.

**ROD Division Disposition Review**

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

Filters

Disposition [v] Not Equal To [v] Closed [v] AND [v] [x]

Open Date [v] Greater Than [v] [ ] AND [v] [x]

Division [v] +

Search Reset

rd(s) returned - now viewing 1 through 2

Disposition	Primary Worker	Secondary Worker	Open Date	Close Date	LOS
Basic Open	Buck, Jennifer		08/03/2018		497
Eligible - ICF/SNF Transition	Reed, Monica	Buck, Jennifer	05/23/2018		569

## Disenrollment Request

- The Pre-Enrollment or Waiver Support Coordinator will begin the case closure tasks and inform the Pre-Enrollment or Waiver Workstream Lead to send the request to Disenroll the Consumer to the State.
- To begin, log into **iConnect** and set Role = WSC/CDC. Click **Go**.

apd iConnect Welcome, Monica Reed | My Dashboard Sign Out Role  
4/23/2018 2:37 PM WSC/CDC [v] GO

File

Quick Search

[ ] Consumers [v] Last Name [v] GO [v]

Participating ADVANCED SEARCH

MY DASHBOARD
CONSUMERS
PROVIDERS
INCIDENTS
CLAIMS
SCHEDULER

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

The screenshot displays a web application interface for managing consumer records. At the top, there are navigation tabs: 'File', 'ADD NOTES', 'Ticklers', and 'View Consumer Incidents'. Below these, there is a search area with a dropdown menu set to 'Consumers' and a 'Last Name' input field. A checkbox labeled 'Participating' is checked. A navigation bar below the search area includes 'MY DASHBOARD', 'CONSUMERS' (highlighted), 'PROVIDERS', 'INCIDENTS', and 'CL'. The main content area shows a record for 'Smith, Marianne (10043)'. Below the name are several tabs: 'Diagnosis', 'Eligibility', 'Medications', 'Auths', 'Provider Documentation', 'Contacts', 'Consumer Module Use', 'Demographics', 'Divisions', 'Programs', 'Provider Selections', 'Notes' (highlighted), 'Forms', 'Appointments', and 'Plans'. A 'Filters' section is visible on the left, with a 'Note Date' dropdown and a '+' button. Below the filters are 'Search' and 'Reset' buttons. A message states '71 Notes record(s) returned - now viewing 1 through 15'. A table below shows the first record:

Note Date	Note By	Note Type	Note Sub-Type	Descri
04/23/2018	Reed, Monica	Due Process	Consumer Update	


4. In the new Note record, update the following fields:
  - a. Division = APD
  - b. Note Type = Waiver Disenrollment
  - c. Note Subtype = Pending Waiver Disenrollment
  - d. Description = Due to Death
  - e. Status = Pending
  - f. Attach the necessary documents
  - g. Route Note record to the 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.
5. When finished, click **File > Save and Close Notes.**

File Tools

**Notes Details**

Division \* APD ▾


Note By \* WLSuper, Robert ▾

Note Date \* 04/23/2018 


Program/Provider ▾

Note Type \* Waiver Disenrollment ▾

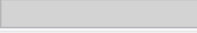
Note Sub-Type Pending Waiver Disenrollment ▾

Description 

Note

Consumer would like to disenroll. Please approve request for disenrollment. 

Status \* Pending ▾

Date Completed 

6. The Waiver Work Stream Lead will monitor their **My Dashboard** for Notes related to Waiver Disenrollment. To do so, log into iConnect and set Role = Region Workstream Lead. Click **Go**.

a. 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

Notes	
Complete	4
Draft	1
I'm Interested	1
Pending	1

Alert Notes	
Unread Alert Notes	0

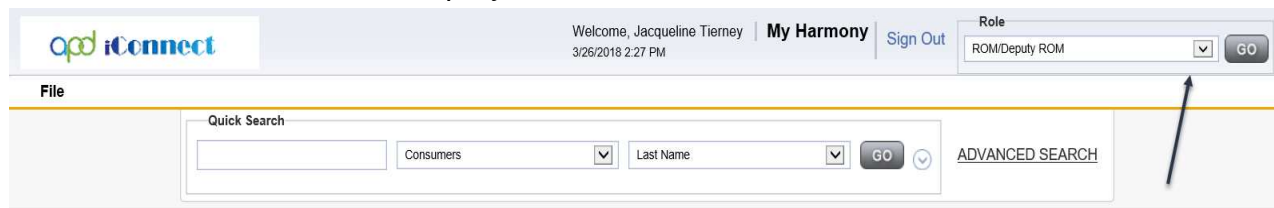
Ticklers	
Ticklers	52

7. In the Pending Notes queue, open the Note record with Note Type = Waiver Disenrollment and Note Subtype = Pending Disenrollment:

- a. Review the contents of the Note to determine next steps. Update the Note accordingly.
- b. Leave Status = Pending
- c. Route the Note record ROM/Designee for approval 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.

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

9. The ROM/Designee will monitor their **My Dashboard** for Notes related to Waiver Disenrollment. Log into iConnect and set Role = ROM/Deputy ROM. Click **Go**.



10. 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



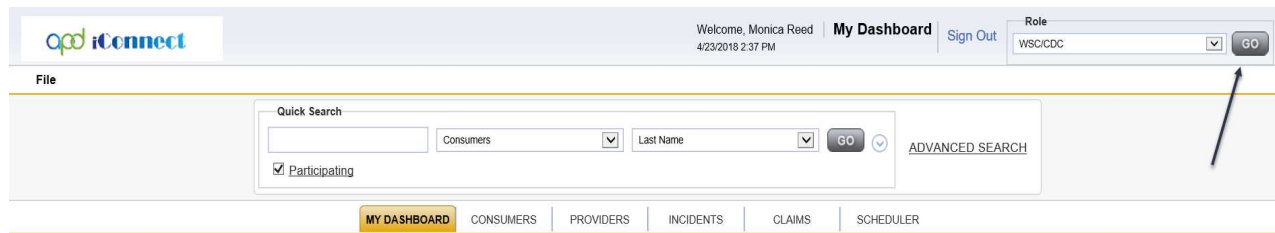
11. In the Pending Notes queue, open the Note record with Note Type = Waiver Disenrollment and Note Subtype = Pending Disenrollment:

- a. Review the contents of the Note and attachments

- b. Update Note Subtype = Waiver Disenrollment Approved OR Waiver Disenrollment Denied
- c. Set Status = Pending
- d. Route the Note record back to the Waiver Workstream Lead and the Waiver Support Coordinator 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.

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

13. The Waiver Support Coordinator will monitor their **My Dashboard** for Notes related to Waiver Disenrollment. Log into iConnect and set Role = WSC/CDC. Click **Go**.



- a. 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.

14. In the Pending Notes queue, open the Note record with Note Type = Waiver Disenrollment and Note Subtype = Waiver Disenrollment Approved or Denied

- a. In the Note record, review the ROM/Designee's decision.

15. When finished, click **File > Close Notes**.

16. To proceed with Waiver Disenrollment, the Waiver Workstream Lead will navigate to the consumer's record and click **Notes > File > Add Note**.

Note Date	Note By	Note Type	Note Sub-Type	D
04/24/2018	Tierney, Jacqueline	Waiver Disenrollment		
04/24/2018	Tierney, Jacqueline	Waiver Disenrollment	Notice of Termination of Waiver Services	

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

- a. Division = APD
- b. Note Type = Waiver Disenrollment
- c. Subtype = Request for Waiver Disenrollment Only OR Request to Disenroll and Return to Pre-Enrollment
- d. Status = Pending
- e. Route the Note record to the State Office Worker 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.

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

File Tools

### Notes Details

Division *	APD
Note By *	Tierney, Jacqueline
Note Date *	04/24/2018
Program/Provider	APD Waiver <a href="#">Details</a>
Note Type *	Waiver Disenrollment
Note Sub-Type	Request for Waiver Disenrollment Only
Description	
Note	Please approve request to Disenroll Consumer from Waiver
Status *	Pending
Date Completed	

## Waiver Program Disenrollment

1. The State Office Worker will monitor their **My Dashboard** for Note records related to Waiver Disenrollment. To do so, log into iConnect and set Role = State Office Enrollment. Click **Go**.
2. 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

Notes	
Complete	4
Draft	1
I'm Interested	1
Pending	1
Alert Notes	
Unread Alert Notes	0
Ticklers	
Ticklers	52

3. In the Pending Notes queue, open the Note record with Note Type = Waiver Disenrollment and Note Subtype = Request for Waiver Disenrollment Only OR Request to Disenroll and Return to Pre-Enrollment

File

Filters

Status Equal To Pending AND

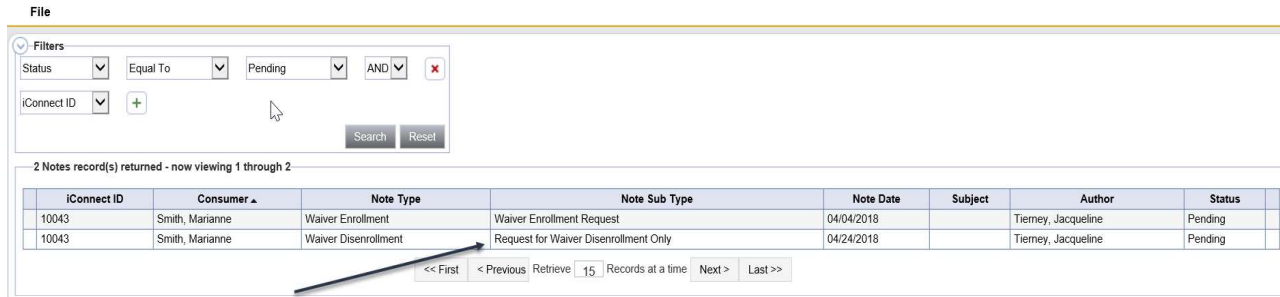
iConnect ID +

Search Reset

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

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
10043	Smith, Marianne	Waiver Enrollment	Waiver Enrollment Request	04/04/2018		Tierney, Jacqueline	Pending
10043	Smith, Marianne	Waiver Disenrollment	Request for Waiver Disenrollment Only	04/24/2018		Tierney, Jacqueline	Pending

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



4. Review the contents of the Note record and update the following fields:
  - a. Note = Indicate whether the disenrollment request is approved or disapproved
  - b. Status = Complete
  - c. Route the Note record to the Waiver Workstream Lead and/or the Pre-Enrollment Workstream Lead as a Note Recipient 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.
5. When finished, click **File > Save and Close Notes**.

File Tools Reports

Notes

**Notes Details**

Division \* APD

Note By \* Tierney, Jacqueline

Note Date \* 04/24/2018

Program/Provider APD Waiver Details

Note Type \* Waiver Disenrollment

Note Sub-Type Request for Waiver Disenrollment Only

Description

On 4/24/2018 at 2:19 PM, Jacqueline Tierney wrote: Please approve request to Disenroll Consumer from Waiver  
 On 4/24/2018 at 2:25 PM, Worker State wrote: Request Approved

Note

New Text

Append Text to Note

Status \* Complete

Date Completed 04/24/2018

6. To disenroll the Consumer, the State Office Enrollment Worker will navigate to the consumer's record and click on the **Programs** tab > open the APD waiver Program record.

MY DASHBOARD **CONSUMERS** PROVIDERS CLAIMS SCHEDULER REPORTS

Smith, Marianne (10043)

Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Module User

Demographics Divisions **Programs** Provider Selections Notes Forms Appointments Plans Payers Legal Issues

Filters

Disposition Not Equal To Closed AND

Program +

Search Reset

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

Division	Program	Worker	Disposition	Disposition Date	Create Date	Enroll Type	Deactivated Date	LOS
APD	APD Waiver	Reed, Monica	Pending Disenrollment	04/24/2018	04/06/2018	Waiting List to Waiver		18
APD	IFS	Reed, Monica	IFS Request	04/09/2018	04/09/2018	IFS		15
APD	CDC+	WLSuper, Robert	Disenrolled	04/09/2018	04/09/2018		04/09/2018	15
APD	APD Waiver	WaiverWLSL, Stanley	Crisis Denied	04/04/2018	04/03/2018	Crisis	04/04/2018	21

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

7. Update the following fields:
  - i. Disposition = Disenrolled
  - ii. Deactivated To = set to correct value
  - iii. Deactivated Date = defaults to today's date
8. When finished, click **File > Save and Close Programs**.

opd iConnect

Marianne Smith  
Last Updated by Jtierney  
at 4/24/2018 10:53:34 AM

Program

File Tools Word Merge

Program

Program Workers

Notes

Events

Track Disposition

Division \* APD

Worker State, Worker Clear Details

Referral Date 04/02/2018

Create Date \* 04/06/2018

Program \* APD Waiver Details

Disposition \* Disenrolled

Disposition Date \* 04/24/2018

9. The Waiver Workstream Lead and/or Pre-Enrollment Workstream Lead will monitor their **My Dashboard** for Note records related to Waiver Disenrollment status.

10. To begin, log into iConnect and set Role = Region Waiver OR Region Pre-Enrollment Workstream or Region Waiver Workstream Lead. Click **Go**.

opd iConnect

Welcome, Caroline Shorter My Dashboard Sign Out

4/4/2024 3:18 PM

Role  
Region Pre-Enrollment Workstream Lead GO

File Reports

Quick Search

Consumers Last Name GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS PROVIDERS

11. 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.

Notes

Complete 7

Draft 1

I'm Not Interested 1

Pending 8

Alert Notes

Unread Alert Notes 0

12. Use the multi variable search to narrow down the search results. Open the Note record with Note Type = Waiver Disenrollment and Note Subtype = Request for Waiver Disenrollment Only OR Request to Disenroll and Return to Pre-Enrollment

- a. Review the contents of the Note. If the request was approved, create a new request for Case Closure via

a new Consumer Note record. Proceed to [Case Closure](#) section.



**Important!**

***DO NOT CLOSE DECEASED CASES until State Office staff approval***


***This step impacts ticklers and completion of tasks.***

**Date of Death Interface**


1. Every 16th day of the month, a scheduled job will run to import data from DOH via an agreed upon file format into iConnect:
  - a. Once imported, the consumer's SSN and Date of Birth in the DOH data are compared with Consumer data within iConnect in order to locate a matching Consumer record.
  - b. If an exact match has been identified, the system will update the consumer's Date of Death, the DOD File Number, and set the DOD Action Field = Request COD on the consumer's Demographic record in iConnect.
  - c. These updates will then trigger a request for the Cause of Death field to be updated via the next monthly DOH data import.
  - d. Note that for probable or inexact Consumer record matches, the consumer's data will not import from DOH into iConnect.

**File Tools Reports**

Demographics	Basic Demographics
Addresses	Salutation <input type="text" value="Mrs. ▼"/>
Contact Names	Last Name * <input type="text" value="Smith"/>
Contact Phones	First Name * <input type="text" value="Marianne"/>
Contact Emails	Consumer Photo <input type="text"/>
Contact Identifiers	Middle Name <input type="text"/>
	Suffix <input type="text" value="Sr. ▼"/>
	Alias <input type="text"/>
	Title <input type="text"/>
	Date of Birth * <input type="text" value="03/04/2004"/>
	Age <input type="text" value="14.1"/>
	Date of Death <input type="text" value="04/27/2018"/>
	Cause of Death <input type="text" value="Natural Causes"/>
	DOD Action <input type="text" value="Request COD ▼"/>
	DOD File Number <input type="text" value="4444"/>
	Gender * <input type="text" value="Female ▼"/>
	Race <input type="text" value="African American ▼"/>
	Ethnicity <input type="text" value="Cambodia ▼"/>






2. The State Office Nurse (or State Office Process Owner) will be able to review the Probable Match Report that identifies probable Consumer record matches between the DOH and iConnect data. Note that this report lives outside of iConnect.
3. After reviewing the Probable Match Report, the State Office Nurse will navigate to the consumer's record in iConnect and add a new Consumer Note record via **Notes > File > Add Note**.
4. In the new Note record, update the following fields:
  - a. Division = APD
  - b. Note Type = Probable Match Report
  - c. Note Subtype = Completed
  - d. Status = Completed
  - e. Route the Note record to the Waiver Clinical Workstream 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.
5. When finished, click **File > Save and Close Notes**.


Marianne Smith | **Notes**  
5/1/2018 10:15 AM

File Tools

---

**Notes Details**

Division *	APD ▾
Note By *	Tierney, Jacqueline ▾
Note Date *	05/01/2018 
Program/Provider	▾
Note Type *	Probable Match Report ▾*
Note Sub-Type	Completed ▾
Description	
Note	<div style="border: 1px solid gray; padding: 5px;">           Reviewed the Probable Match Report to ensure that the correct match was identified in the DOH data         </div> 
Status *	Complete ▾
Date Completed	05/01/2018

6. Based on the review of the Probable Match Report, updates to the consumer's death details may need to be updated (if the fields were not already automatically updated via the monthly DOH data import).
7. The State Office Nurse will navigate to the consumer's record and click **Demographics > Edit > Edit Demographics**. Update the following fields.
  - a. Date of Death = update to correct date of death based on research found
  - b. DOD Action = Request COD
  - c. DOD File Number
  - d. Cause of Death
8. When finished, click **File > Save and Close Demographics**.
9. When finished, proceed to the [Chapter on Case Closure](#).