

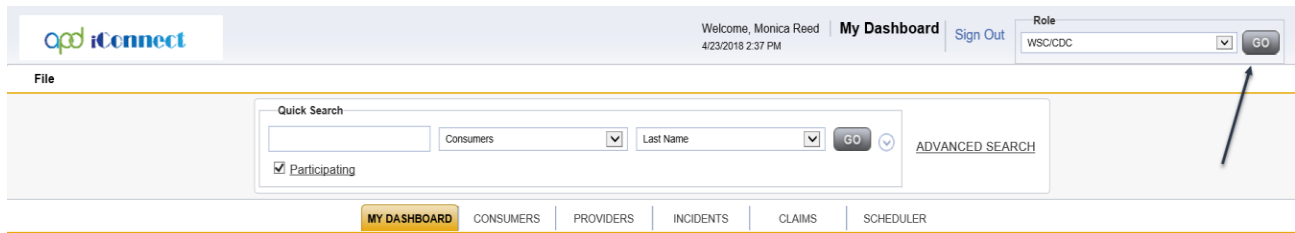
UPDATED! Chapter 20 | Case Closure

Introduction

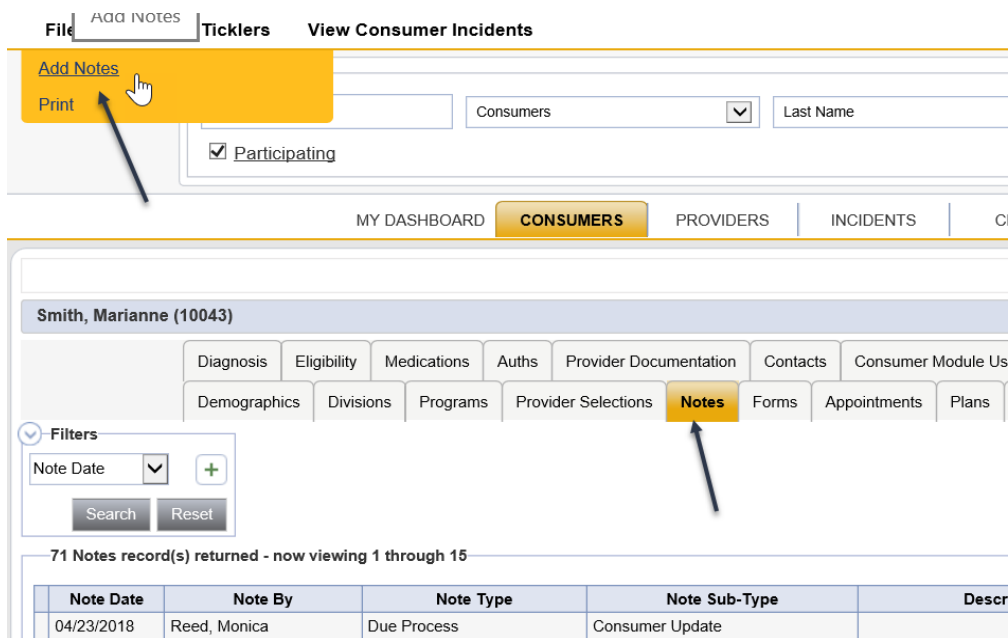
Although a Consumer has been added to the Waiver, often it is necessary for the Consumer to be removed from the waiver. While there are various methods to the disenrollment and/or transfers, there are also certain circumstances that automatically make a Consumer ineligible for Waiver Services. This Chapter reflects the process in which to Close a Case.

Waiver Disenrollment

1. Upon receiving notification that a Consumer needs to be removed from the Waiver for any reason other than incarceration or Temporary Service Placement, the assigned Waiver Support Coordinator will initiate the Waiver Disenrollment process.
2. To begin, log into **iConnect** and set Role = WSC/CDC. Click Go.



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



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. Status = Pending
 - e. Attach the necessary documents
 - f. Route Note record to the Waiver Work Stream Lead by clicking the **Lookup** button next to Add Note Recipient. In the pop-up window, type in the Worker's Last Name and click **Search**. In the Search results, click on the matching Worker Name to route the note to that recipient.

Important: It is crucial to add the proper note recipients to the note. This will allow the waiver unit to start their tasks. Not adding the proper note recipients can delay the disenrollment process.

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

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

- Division: APD
- Note By: WLSuper, Robert
- Note Date: 04/23/2018
- Program/Provider: (empty)
- Note Type: Waiver Disenrollment
- Note Sub-Type: Pending Waiver Disenrollment
- Description: (empty)
- Note: Consumer would like to disenroll. Please approve request for disenrollment.
- Status: Pending
- Date Completed: (empty)

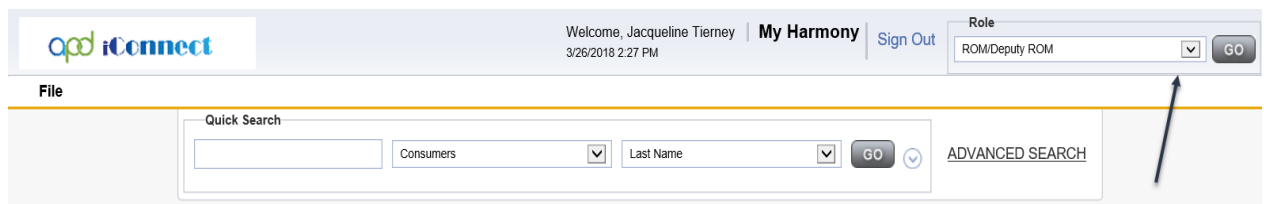
6. The Waiver Workstream Lead will monitor their **My Dashboard** for Notes related to Waiver Disenrollment. To do so, log into iConnect and set Role = Region Workstream Lead. Click **Go**.
 - a. On the **My Dashboard**, locate the Consumers panel and scroll down to the Notes section. Click on the **Pending** 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

- In the Pending Notes queue, open the Note record with Note Type = Waiver Disenrollment and Note Subtype = Pending Disenrollment:
- Review the contents of the Note to determine next steps. Update the Note accordingly. Leave Status = Pending.
- Route the Note record ROM/Designee for approval by clicking the **Lookup** button next to Add Note Recipient. In the pop-up window, type in the Worker's Last Name and click **Search**. In the Search results, click on the matching Worker Name to route the note to that recipient.
- When finished, click **File > Save and Close Note**
- 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**.



- 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

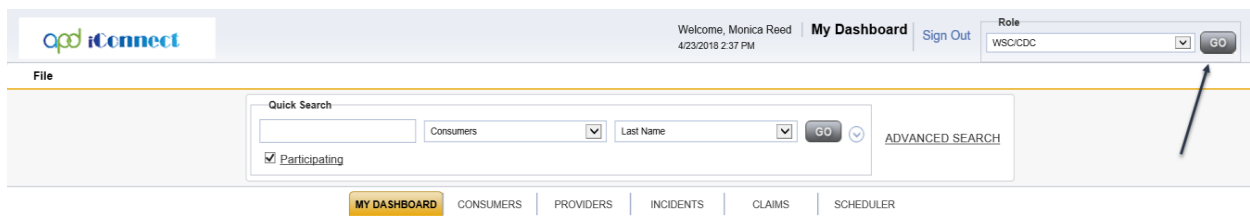
Alert Notes	
Unread Alert Notes	0

Ticklers	
Ticklers	52

13. 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 **Lookup** button next to Add Note Recipient. In the pop-up window, type in the Worker's Last Name and click **Search**. In the Search results, click on the matching Worker Name to route the note to that recipient.

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

15. 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.

16. In the Pending Notes queue, open the Note record with Note Type = Waiver Disenrollment and Note Subtype = Waiver Disenrollment Approved or Denied
17. In the Note record, review the ROM/Designee's decision.
18. When finished, click **File > Close Notes**.
19. Update the consumer's Waiver Division record to indicate pending disenrollment. Navigate to the consumer's record > click on the **Divisions** tab > open the APD waiver Division record.
20. In the Division record, update the following fields:
 - a. Disposition = Pending Disenrollment
 - b. Disposition Date = Date Disposition was changed
21. When finished, click **File > Save and Close Division**.



File

Division

Events

Track Disposition

An asterisk (*) indicates a required field

Events

Division *	APD
Disposition *	Pending Disenrollment
Disposition Date	07/29/2025
Open Date	02/23/1999
Data Entry Date	
Primary Worker *	WSC, Sylvia Details
Secondary Worker	Mott, Shelia Details
Application Received Date *	10/01/2011

22. The WSC will get a Workflow Wizard = End Date Planned Services/Plan, Validate Plan, & Update Authorizations tickler.

hssflapdstage.wellsky.com/interfacetest-humanservicessso/Pages/WFV

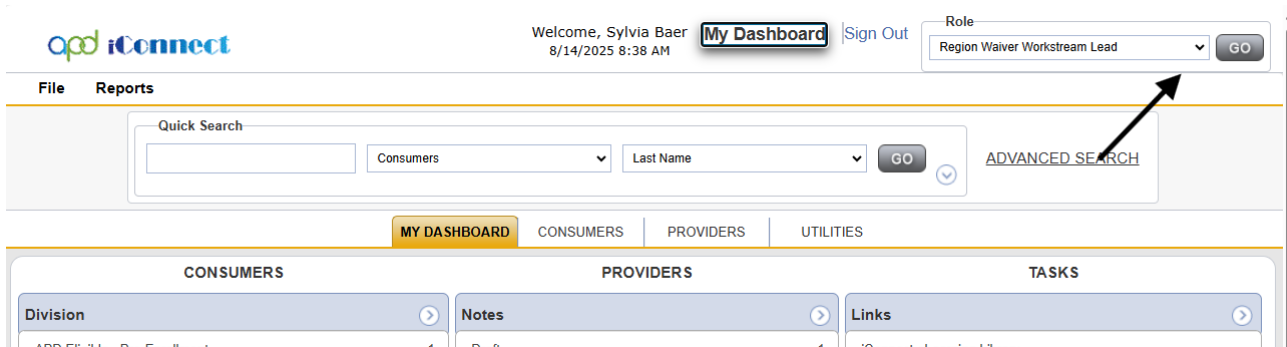


File Reports

Workflow Wizard

[End Date Planned Services/Plan, Validate Plan, & Update Authorizations](#)

23. The Waiver Lead will monitor their **My Dashboard** for Notes related to Waiver Disenrollment. Log into iConnect and set Role = Regional Waiver 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.

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

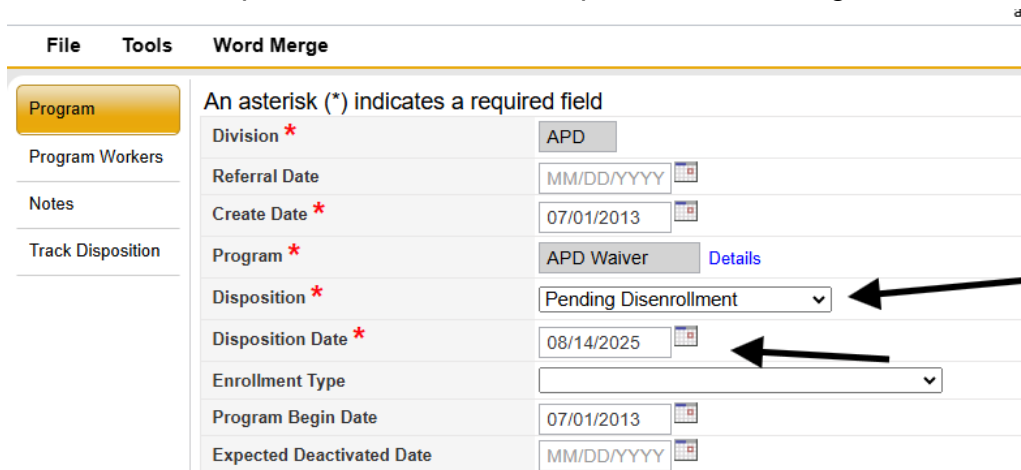
25. In the Note record, review the ROM/Designee's decision.

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

27. Update the consumer's Waiver Program record to indicate pending disenrollment. Navigate to the consumer's record > click on the **Programs** tab > open the APD Waiver Program record.

28. In the Program record, update the following fields:

- a. Disposition = Pending Disenrollment
- b. Disposition Date = Date Disposition was changed

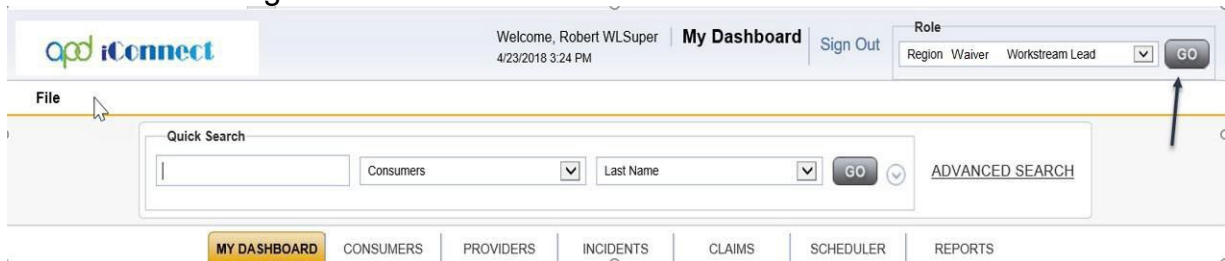


29. When finished, click **File > Save and Close Division**.

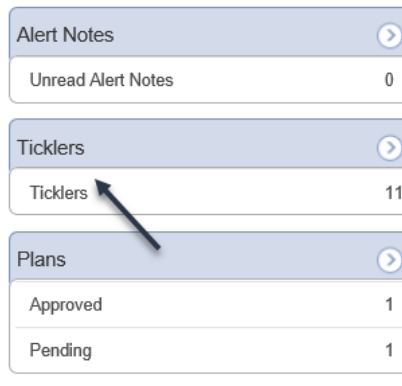
30. Upon the Program record with Disposition = Pending Disenrollment, a Workflow Wizard will trigger the following Ticklers:

- a. Send Notice of Pending Termination of Waiver Services (Only for Non-Compliance), Assigned to Waiver Workstream Lead, Due Immediately – **Can be reassigned as needed**
- b. Send Notice of Pending Termination of Waiver Services, **Can be reassigned as needed**

31. To complete the Ticklers, the Waiver Workstream Lead or Waiver Workstream Worker will log into iConnect and set Role = Region Waiver Workstream Lead or Worker. Click **Go**.



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



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

File

Filters

Status New

Last Name smith

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 Notice of Pending Termination of Waiver Services (Only for Non Compliance)	04/23/2018	04/23/2018		New	Tierney, Jacqueline
Smith, Marianne	10043	Send Notice of Termination of Waiver Services	04/23/2018	05/23/2018		New	Tierney, Jacqueline



Tip

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

32. Locate the Tickler called Send Notice of Pending Termination of Waiver Services (sent only for Non- Compliance) in the Tickler Queue.

- a. If the termination of Waiver Services is NOT related to non-compliance, cancel the Tickler. To do so, hover over the arrow next to the Tickler and click **Cancel**.

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 Notice of Pending Termination of Waiver Services (Only for Non Compliance)	04/23/2018	04/23/2018		New	Tierney, Jacqueline
Smith, Marianne	10043	Send Notice of Termination of Waiver Services	04/23/2018	05/23/2018		New	Tierney, Jacqueline

Cancel

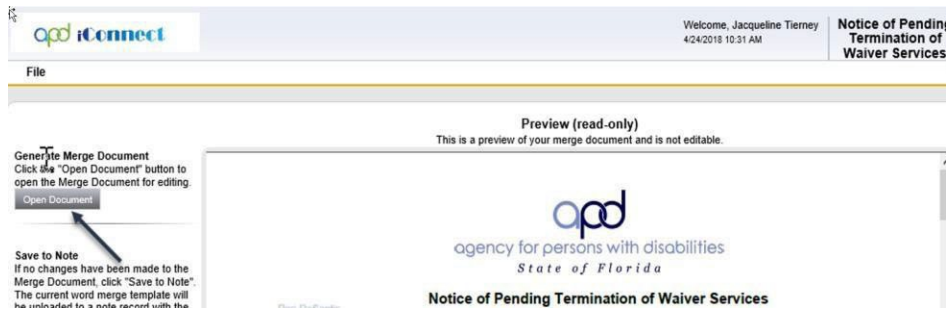
Edit

Reassign

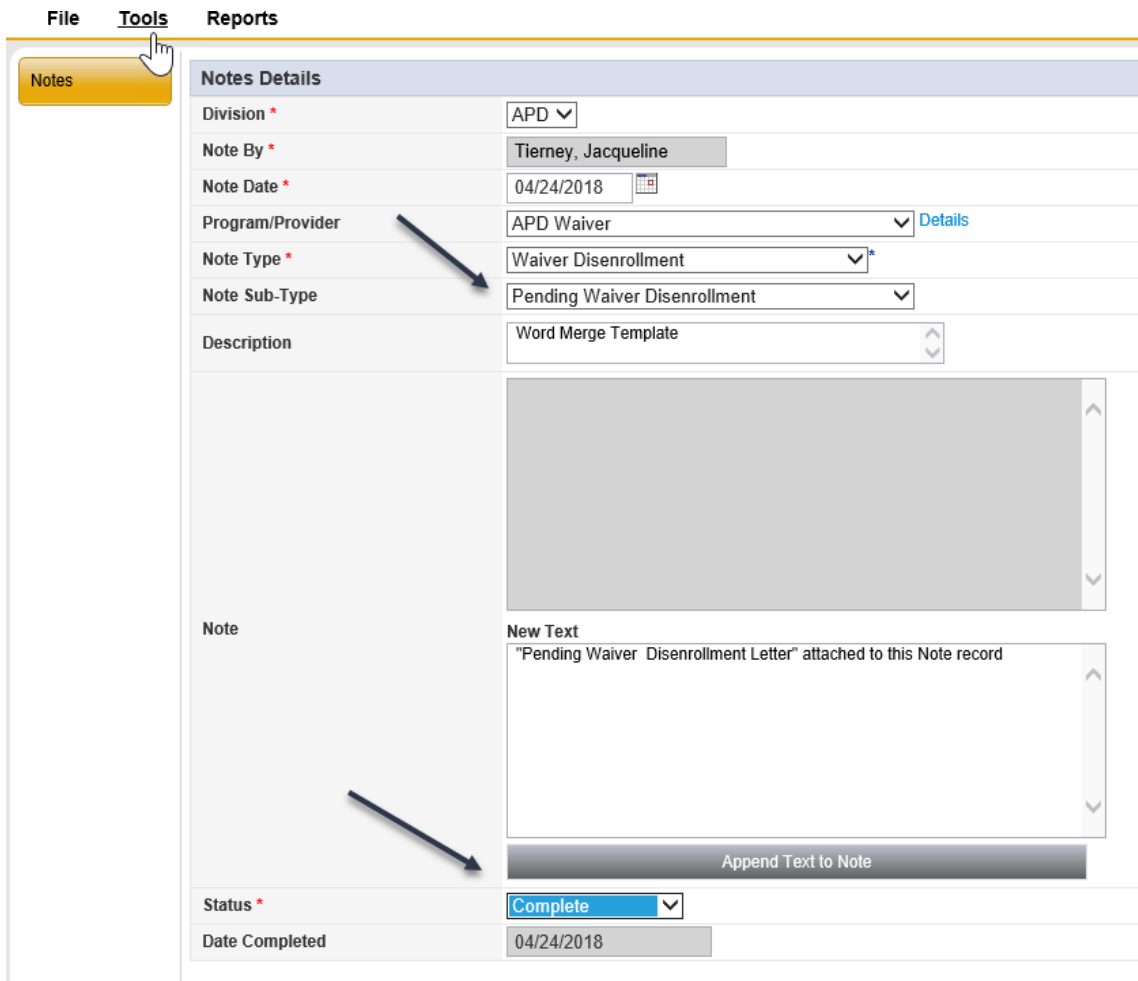
Complete

View Consumers Record

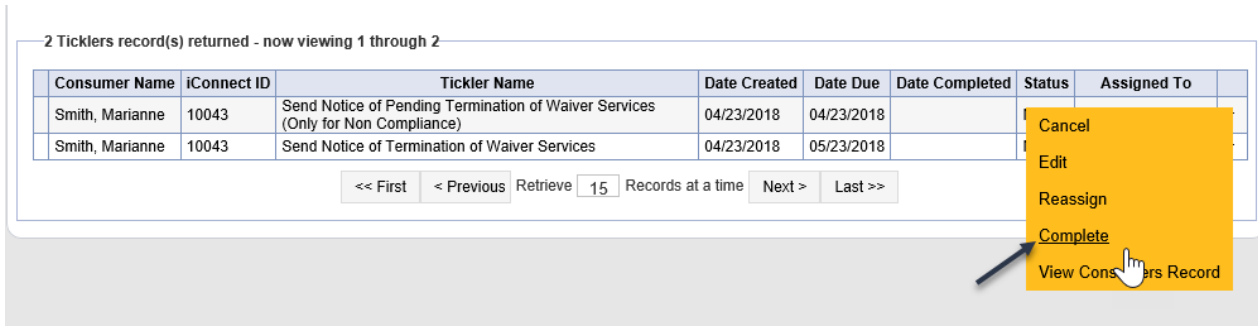
- b. If the termination of Waiver Services IS related to non-compliance, click to open the Tickler.
 - i. Upon doing so, the Notice of Pending Termination of Waiver Services letter will open in Word Merge Preview mode.
 - ii. Click **Open Document** to edit the contents of the letter in Microsoft Word. Save the document to your computer.



- c. Print and mail the letter to the Consumer.
- d. Back in the Word Merge preview screen, click **Upload and Save to Note**. In the new Consumer Note record, update the following fields:
 - i. Division = APD
 - ii. Note Type = Waiver Disenrollment
 - iii. Note Subtype = Pending Waiver Disenrollment
 - iv. Status = Complete
- e. When finished, click **File > Save and Close Notes**



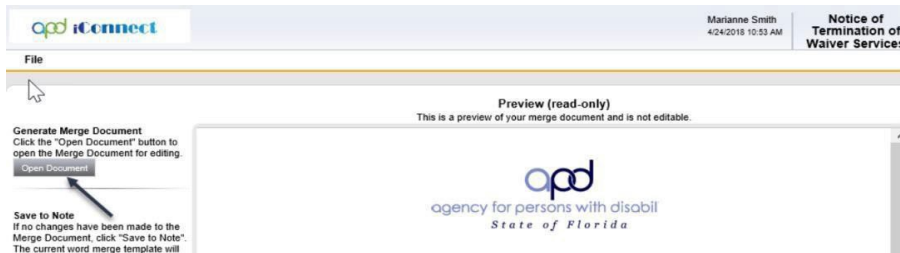
33. Back in the Tickler Queue, hover over the arrow next to the Tickler to click **Complete**:



34. In the Tickler Queue, click to open the tickler called Send Notice of Termination of Waiver Services.

35. Upon doing so, the Notice of Pending Termination of Waiver Services letter will open in Word Merge Preview mode.

36. Click **Open Document** to edit the contents of the letter in Microsoft Word. Save the document to your computer.



37. Print and mail the letter to the Consumer.

38. Back in the Word Merge preview screen, click **Upload and Save to Note**. In the new Consumer Note record, update the following fields:

- a. Division = APD
- b. Note Type = Waiver Disenrollment
- c. Note Subtype = Notice of Termination of Waiver Services
- d. Status = Complete

39. When finished, click **File > Save and Close 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 Notice of Termination of Waiver Services

Description Word Merge Template

Note

New Text
Notice of Termination of Waiver Services Letter attached to this Note record

Append Text to Note

Status * Complete

Date Completed 04/24/2018

40. Upon saving the Note record, a Workflow Wizard will trigger with the following Tickler:

- a. 35 Day Due Process Reminder – *Assigned to Self (reassign to Waiver Workstream Lead if Worker completed the Note)*, Due 35 Days from the date that the Final Notice of Termination of Waiver Services Letter was sent to the Consumer
- b. Notify all Providers of Disenrollment, *Assigned to WSC*, Due 35 Days from the date that the Final Notice of Termination of Waiver Services Letter was sent to the Consumer
- c. End Date Planned Services and Complete Plans – *Assigned to WSC*, Due Immediately
- d. End Date All Authorizations – *Assigned to WSC*, Due Immediately

Ticklers

Filters

Status Equal To New AND

iConnect ID +

Apply Alert Days Before Due

Search Reset

514 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	End Date Planned Services & Complete Plans	08/26/2018	09/30/2018		New	Buck, Jennifer
Sheppard, John	10106	End Date All Authorizations	08/26/2018	09/30/2018		New	Buck, Jennifer
Sheppard, John	10106	35 Day Due Process Reminder	08/26/2018	09/29/2018		New	Buck, Jennifer
Sheppard, John	10106	Notify All Providers of Disenrollment	08/26/2018	09/30/2018		New	Buck, Jennifer

41. Ticklers are visible from My Dashboard.
42. The Waiver Workstream Lead will work through each Tickler listed in the Workflow Wizard window.
43. To begin, hover over the arrow next to the Tickler called 35 Day Due Process Reminder to click **Open**.

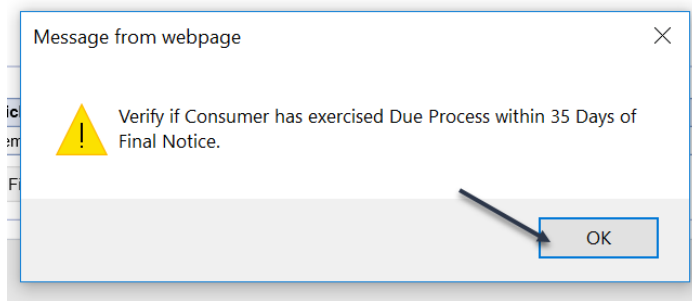
**Remember!**

There are only 3 instances in which the Waiver Workstream Lead should not wait the 35 days and send the request immediately.

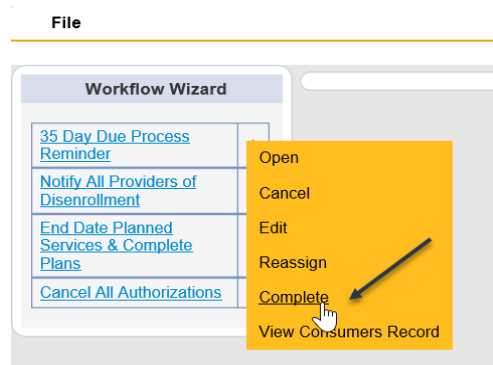
1. Consumer moves to ICF
2. Consumer admitted to DDC
3. Consumer dies (proceed to Chapter on Death Reporting).

*If the closure is for other circumstances, not outlined above, the Waiver Workstream Lead **MUST** wait the 35 days.*

44. Upon doing so, a Message Tickler will appear
 - Verify if Consumer has exercised Due Process within 35 Days of Final Notice. Click **OK**.



45. After verifying if the Consumer exercised Due Process, hover on the arrow next to the Tickler to click **Complete**.



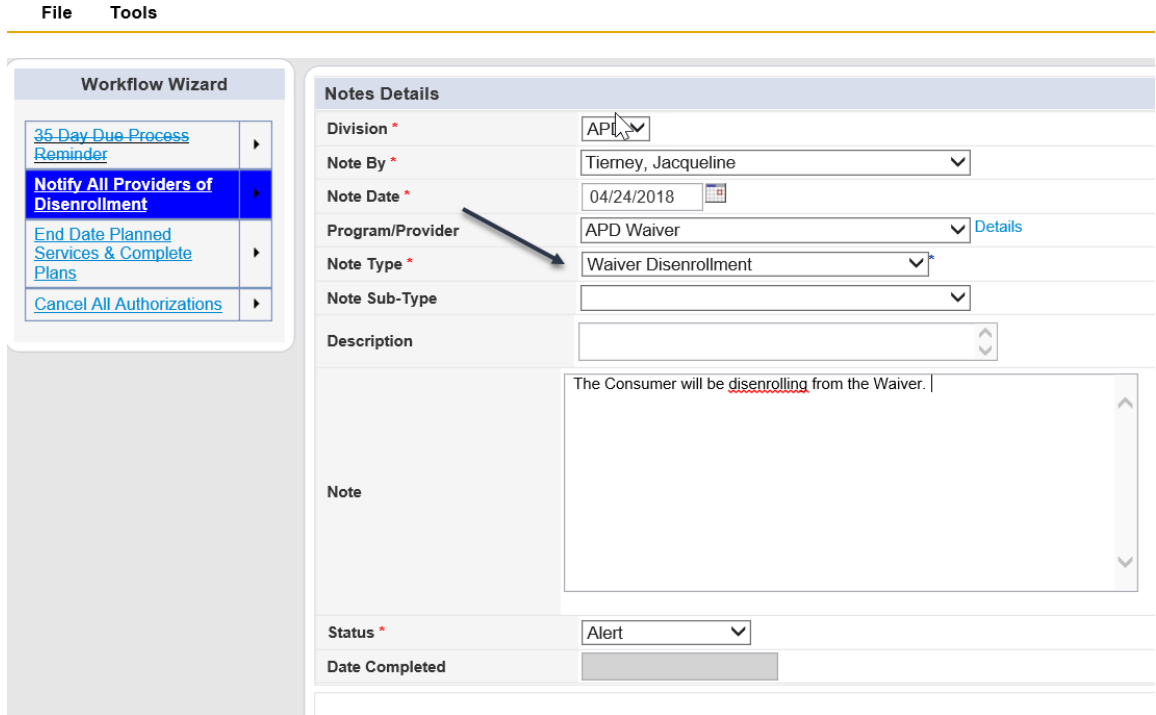
46. The **WSC** will navigate to their Ticklers queue to identify the ticklers assigned. Hover over the arrow next to the Tickler called Notify All Providers of Disenrollment to click **Open**.

47. Upon doing so, a new Consumer Note record will open. Update the following fields:

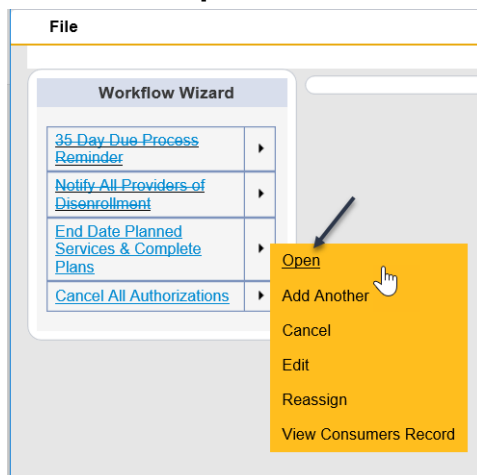
- a. Division = APD
- b. Program/Provider = Update as necessary
- c. Note Type = Waiver Disenrollment
- d. Note Subtype = N/A
- e. Status = Alert
- f. Route the Note to the Waiver Workstream Lead by clicking the **Lookup** button next to Add Note Recipient. In the pop-up window, type in the Worker's Last Name and click **Search**. In the Search results, click on the matching Worker Name to route the note to that recipient

48. When finished, click **File > Save Notes**

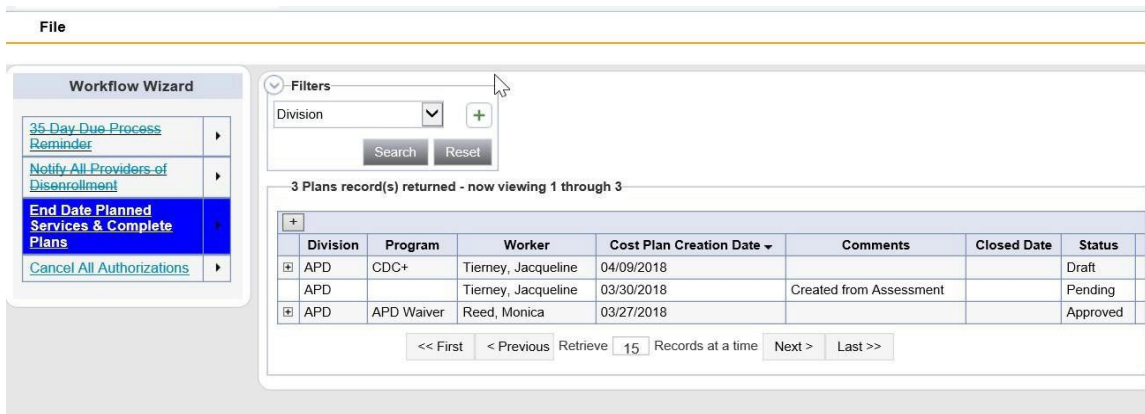
49. Complete this process for all relevant Service Providers by clicking **Add Another**



50. Back in the Tickler Queue, hover over the arrow next to the Tickler called End Date Planned Services & Complete Plans to click **Open**.



51. Upon doing so, the consumer’s Plans List View Grid will open.



52. Click into the relevant Plan record and update all necessary fields.

53. When finished, click **File > Save Plans**

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

55. Back in the Tickler Queue, click to open the Tickler called End Date All Authorizations.

56. Upon doing so, the consumer’s Authorizations List View Grid will open

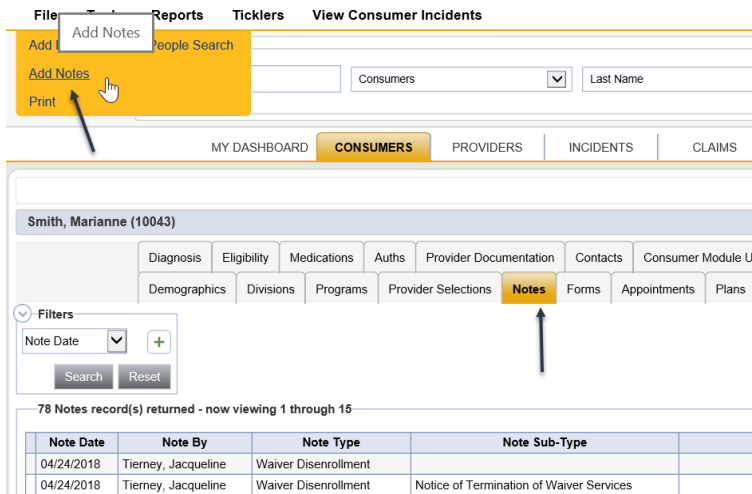
57. Click into each relevant Authorization record and update the End Date field.

58. When finished, click **File > Save Auth Service** and **File > Close Workflow Wizard**

59. Make a determination about the consumer’s Case:

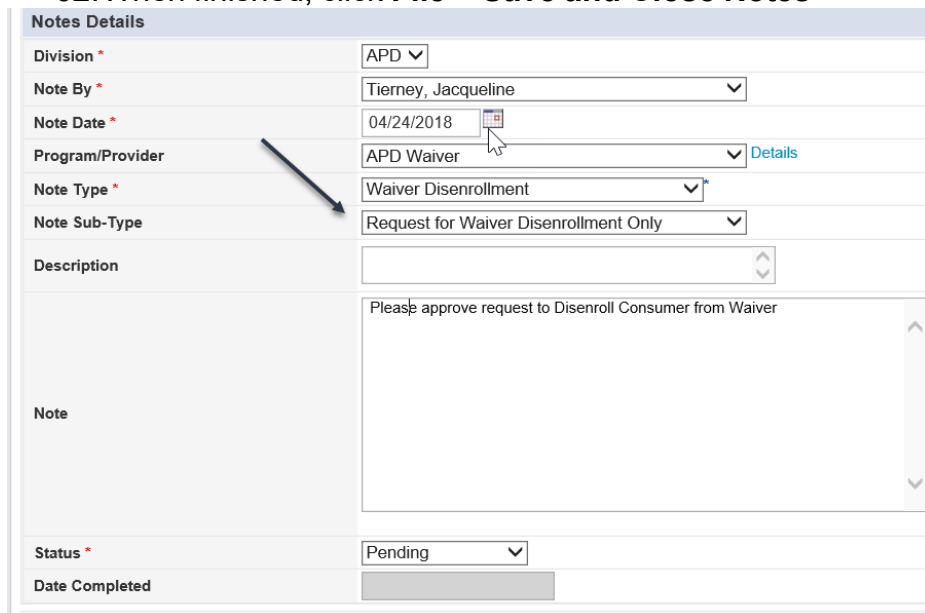
- a. Did the Consumer Exercise Due Process? If so, proceed to [Chapter on Due Process](#).
- b. If the Consumer did NOT Exercise Due Process, make a decision if one of the following applies to the consumer’s Case:
 - i. If any of the following apply, proceed below to Waiver Disenrollment
 - ii. Should the consumer’s Case be fully Closed? Or
 - iii. Should the Consumer be Disenrolled and put back on the Waiver Pre- Enrollment? or

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



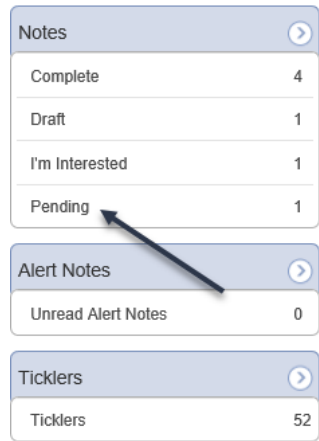
61. In the new Note record, update the following fields:
- Division = APD
 - Note Type = Waiver Disenrollment
 - Subtype = Request for Waiver Disenrollment Only OR Request to Disenroll and Return to Pre-Enrollment
 - Status = Pending
 - Route the Note record to the State Office Worker by clicking the **Lookup** button next to Add Note Recipient. In the pop-up window, type in the Worker's Last Name and click **Search**. In the Search results, click on the matching Worker Name to route the note to that recipient.

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

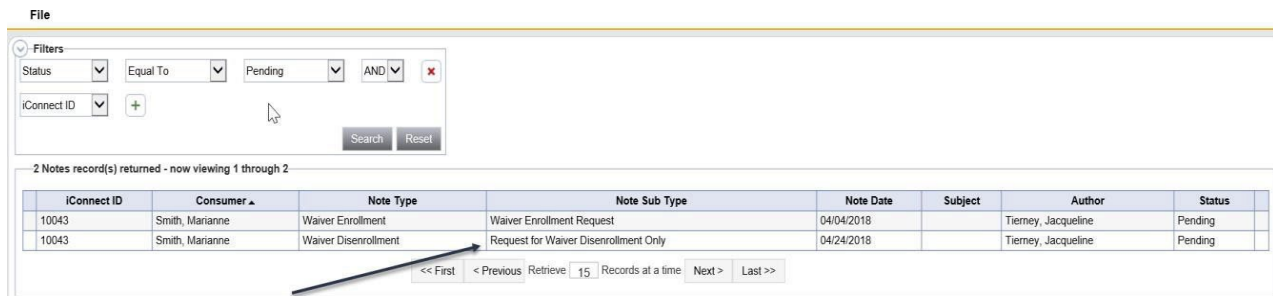


63. The State Office Worker will monitor their **My Dashboard** for Note records related to Waiver Disenrollment. To do so, log into iConnect and set Role = State Office Enrollment. Click **Go**.

64. 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



65. 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



66. 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 **Lookup** button next to Add Note Recipient. In the pop-up window, type in the Worker's Last Name and click **Search**. In the Search results, click on the matching Worker Name to route the note to that recipient.

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

68. 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.

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	WaiverWSL, Stanley	Crisis Denied	04/04/2018	04/03/2018	Crisis	04/04/2018	21

69. Update the following fields:
- Disposition = Disenrolled
 - Deactivated To = set to correct value
 - Deactivated Date = defaults to today's date

70. When finished, click **File > Save and Close Programs**

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
Enrollment Type Pre-Enrollment to Waiver
Program Begin Date 04/06/2018
Expected Deactivated Date

71. If the Consumer needs to return on the Pre- Enrollment, proceed to the [Chapter on Pre- Enrollment processes](#). Otherwise, proceed below. If the Consumer's Division and/or Program record were Closed out and/or Disenrolled, proceed to [Chapter 22- Re-Enrollment](#). (Do not create a New Division or Program record for the same Program).

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

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

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

74. 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

- a. 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

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

Request for Case Closure

1. To create the request for Case Closure, navigate to the consumer's record and click **Notes > File > Add Note**.
2. In the new Note record, update the following fields:
 - a. Division = APD
 - b. Note Type = Case Closure
 - c. Note Subtype = Request for Case Closure
 - d. Status = Pending
 - e. Route the Note record to the ROM or designee by clicking the **Lookup** button next to Add Note Recipient. In the pop-up window, type in the Worker's Last Name and click **Search**. In the Search results, click on the matching Worker Name to route the note to that recipient.
3. When finished, click **File > Save and Close Notes**

File Tools

Notes Details

Division * APD ▾

Note By * Tierney, Jacqueline ▾

Note Date * 04/25/2018 📅

Program/Provider APD Waiver ▾ [Details](#)

Note Type * Case Closure ▾*

Note Sub-Type Request for Case Closure ▾

Description

Note

4.25.18 - Request for ROM to approve Case Closure Request

Status * Pending ▾

Date Completed

- The Region Operations Manager (ROM) will monitor their **My Dashboard** for Note records related to Waiver Disenrollment status.
- To begin, log into iConnect and set Role = ROM/Deputy ROM. Click **Go**.

opd iConnect

Welcome, Jacqueline Tierney | My Dashboard Sign Out

Role ROM/Deputy ROM ▾ **GO**

File

Quick Search

| Consumers ▾ Last Name ▾ **GO** [ADVANCED SEARCH](#)

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER REPORTS

- 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	7
Draft	1
I'm Not Interested	1
Pending	9

Alert Notes >

Unread Alert Notes	0
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Use the multi variable search to narrow down the search results. Open the Note record with Note Type = Case Closure and Note Subtype = Request for Case Closure.

File

Filters

Note Sub Type Contains Case AND

iConnect ID +

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

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
10043	Smith, Marianne	Case Closure	Request for Case Closure	04/25/2018		Tierney, Jacqueline	Pending

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

7. Review the contents of the Note. If additional info is needed, update the following fields:
 - a. Note Subtype = Additional Information Needed
 - b. Status = Pending
 - c. Route the Note back to the designated Waiver Workstream Lead or Pre-Enrollment Workstream Lead by clicking the **Lookup** button next to Add Note Recipient. In the pop-up window, type in the Worker's Last Name and click **Search**. In the Search results, click on the matching Worker Name to route the note to that recipient.

8. If no additional info needed, update the following fields:
 - a. Note Subtype = Case Closure Approved
OR Case Closure Denied
 - b. Status = Complete
 - c. Route the Note back to the designated Waiver Workstream Lead or Pre- Enrollment Workstream Lead by clicking the **Lookup** button next to Add Note Recipient. In the pop-up window, type in the Worker's Last Name and click **Search**. In the Search results, click on the matching Worker Name to route the note to that recipient.

9. Click File > Save and Close Notes.

Notes Details

Division * APD

Note By * Tierney, Jacqueline

Note Date * 04/25/2018

Program/Provider APD Waiver [Details](#)

Note Type * Case Closure

Note Sub-Type Case Closure Approved

Description

Note

New Text

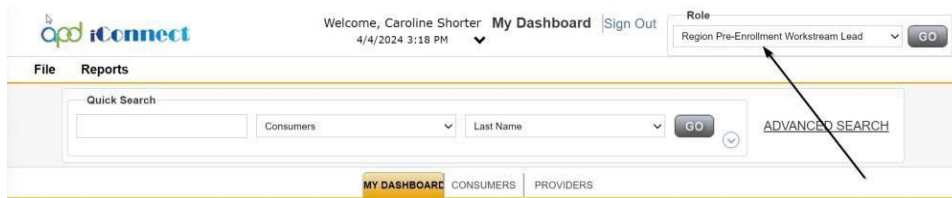
Append Text to Note

Status * Complete

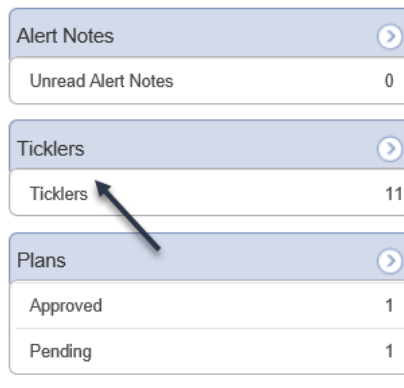
Date Completed 04/25/2018

10. Upon saving the Note record with Note Type = Case Closure Note Subtype = Case Closure Approved with Status = Complete, a Workflow Wizard will trigger the following Ticklers:
- a. Send the Notice of Case Closure – *Assigned to Waiver or Pre-Enrollment Workstream Lead*, Due Immediately
 - b. Close the Case – *Assigned to Waiver or Pre-Enrollment Workstream Lead*, Due 10 days from Note Date Completed date
 - c. Close the Division Record - *Assigned to Waiver or Pre-Enrollment Workstream Lead*, Due 365 days from Note Date Completed date

11. To complete the Ticklers, the Waiver Workstream Lead or Pre-Enrollment Workstream Lead will log into iConnect and set Role = Region Pre-Enrollment Workstream Lead. Click **Go**.

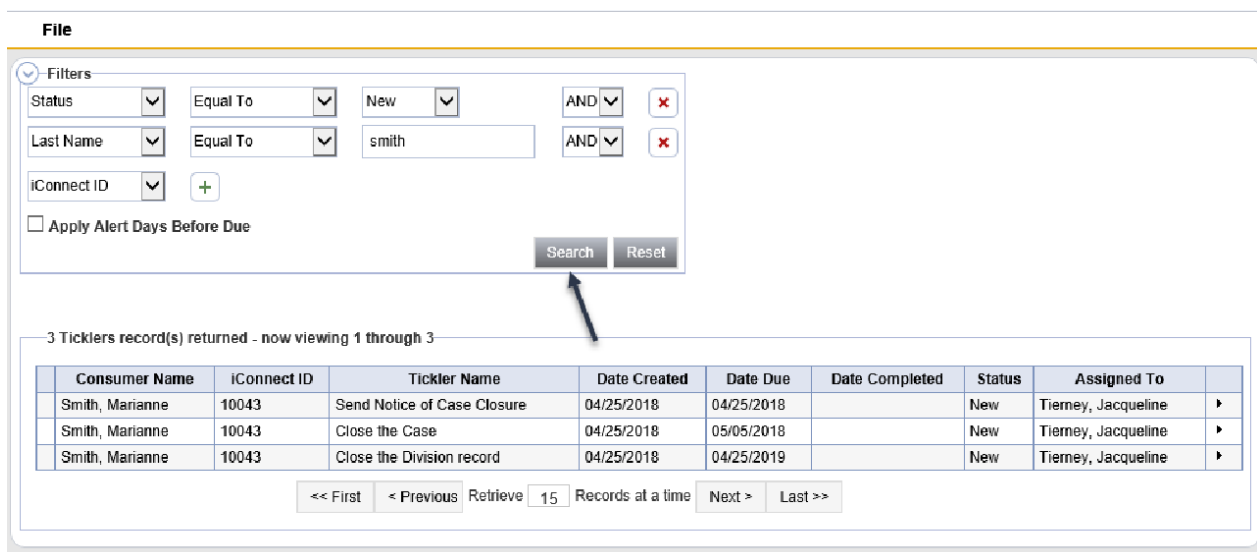


12. On the **My Dashboard**, find the Consumers Section and scroll down to the Ticklers Panel. Click on **Ticklers Due** to access the Tickler



Queue:

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



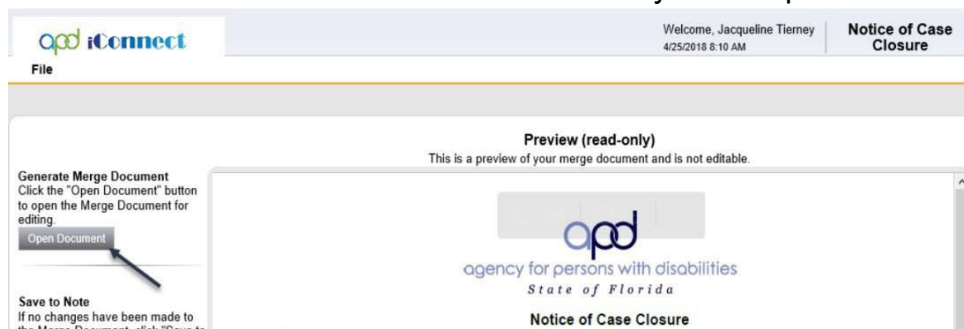
**Tip**

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

13. Click to open the Tickler called Send Notice of Case Closure.

14. Upon doing so, the Notice of Case Closure letter will open in Word Merge preview mode.

15. Click **Open Document** to edit the contents of the letter in Microsoft Word. Save the document to your computer.



16. Print and mail the letter to the Consumer.

17. Back in the Word Merge preview screen, click **Upload and Save to Note**. In the new Consumer Note record, update the following fields:

- a. Division = APD
- b. Note Type = Case Closure
- c. Status = Complete

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

19. In the Tickler Queue, hover over the arrow next to the Tickler to click **Complete**:

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

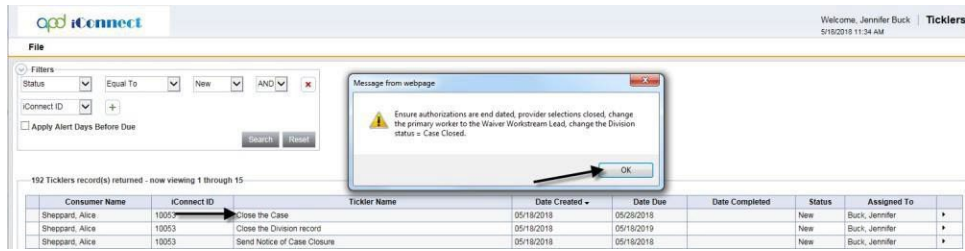
Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Send Notice of Case Closure	04/25/2018	04/25/2018		New	
Smith, Marianne	10043	Close the Case	04/25/2018	05/05/2018		New	
Smith, Marianne	10043	Close the Division record	04/25/2018	04/25/2019		New	

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

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

20. Back in the Tickler Queue, click to open the next Tickler called Close the Case.

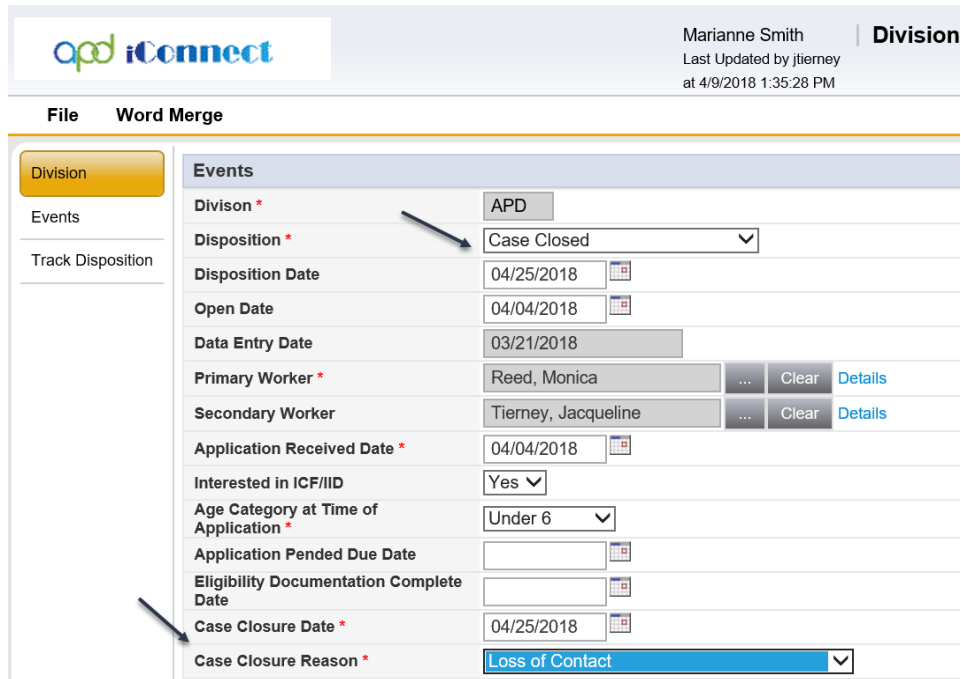
21. Upon doing so, a Message Tickler will appear – Ensure auths are end dated, provider selections closed, change primary worker to the WS Lead (same as secondary worker). Click **OK**.



22. To close the consumer’s Case, navigate to the consumer’s record > click on the **Divisions** tab > open the consumer’s APD Division record and update the following fields:

- a. Disposition = Case Closed
- b. Primary Worker = change to the Waiver Workstream Lead – Same as the Secondary Worker.
- c. Case Closure Date = Update as appropriate
- d. Case Closure Reason = Update as appropriate

23. When finished, click **File > Save and Close Divisions**

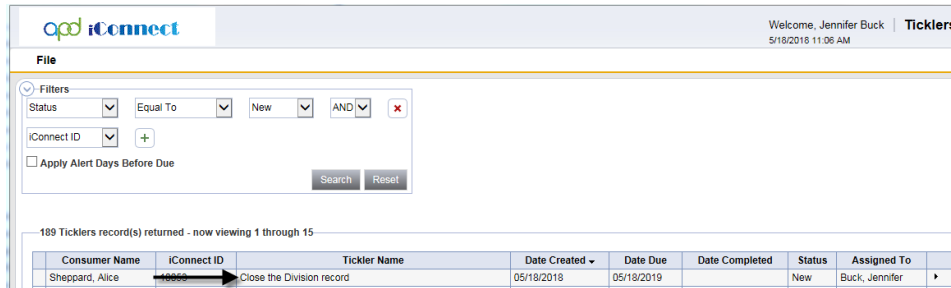


24. On the consumer’s record, click on **Provider Selections** to verify that all Provider Selection records are closed.

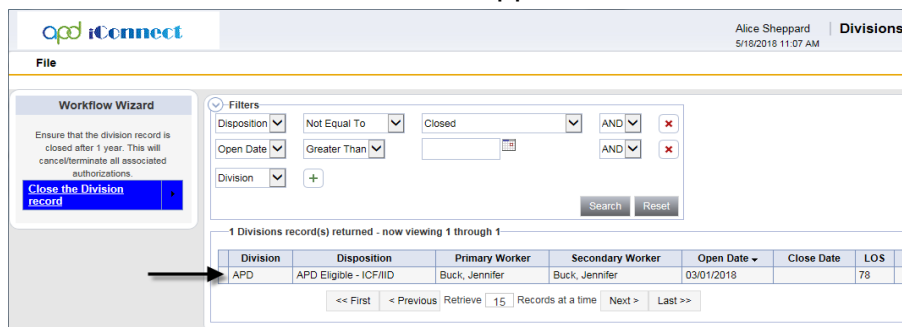
On the consumer’s record, click on **Authorizations** to verify that each Authorization record is appropriately end dated.

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

26. In 365 days after Case Closure Request was approved, the Pre-Enrollment Workstream Lead or Waiver Workstream Lead will return to the Tickler Queue to complete the final Tickler called Close the Division Record.



27. Upon clicking on the Tickler, the consumer's Divisions List View Grid will appear.



28. Click to open the APD Division record. Update the following fields:

- a. Disposition = Closed
- b. Closure Date = Update as appropriate
- c. Closure Reason = Update as appropriate

29. When finished, click **File > Save and Close Divisions**

30. Now that the Consumer is closed to the APD Division, ensure that all Authorizations are terminated automatically when the Division was closed. Navigate to the consumer's record and click on the **Authorizations** tab (Note those records with Status = Terminated).

