

Chapter 5 | Standard APD Waiver Enrollment

Introduction

This Chapter outlines the workflow from the point in time when a Consumer on the Pre-Enrollment is approved for waiver enrollment.

As the Consumer moves through the process of receiving a Waiver offer, accepting the offer and ultimately enrolling onto the APD Waiver Program, designated workers will update the “Pre-Enrollment Status” field on the Consumer’s Pre-Enrollment record to indicate where the Consumer is in the enrollment process.

The Consumer who has received an offer for waiver enrollment contacts the State Office to accept/decline the offer to participate in the APD Waiver and to chooses a Waiver Support Coordinator (WSC). The Pre-Enrollment Support Coordinator will record the Consumer’s WSC selection via a Provider Selection record in iConnect and remove the consumer from the Pre-Enrollment.

The WSC will be able to determine that they have been selected by monitoring their My Dashboard in iConnect. They will notice one of three possibilities.

1. The number of consumers listed as APD Eligible – Waiver will have increased.
2. They may have a new note in the Notes panel.
3. They have new ticklers.

MY DASHBOARD CONSUMERS	
CONSUMERS	
Division	>
APD Eligible - Waiver	2
My Enrollments	>
Enrolled	2
Provider Selections	>
Open	1
Notes	>
Complete	1
Pending	2
Ticklers	>
Ticklers	4

Standard Waiver Enrollment

Assigned to WSC (Provider Worker)

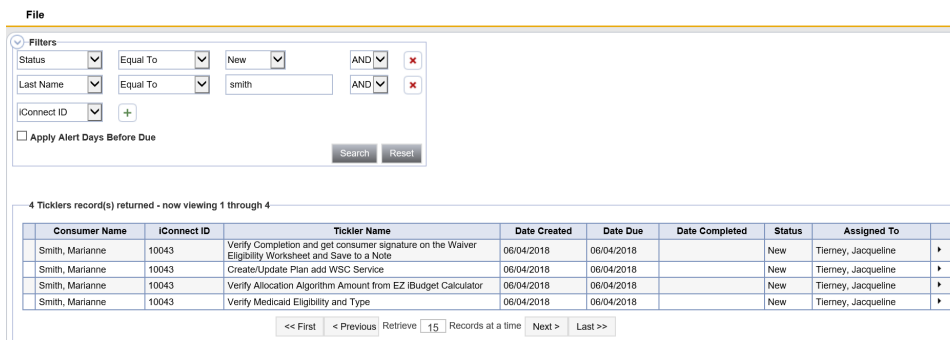
1. To finish the consumer's Waiver Enrollment, the assigned Waiver Support Coordinator will log into iConnect and set Role = WSC/CDC



2. The assigned Waiver Support Coordinator will monitor their **My Dashboard** for new Ticklers. Find the Consumers Section and scroll down to the Ticklers Panel. Click on the **Ticklers** Link to open the Tickler Queue:



- a. Use the multivariable search to narrow down the results in the Tickler Queue:

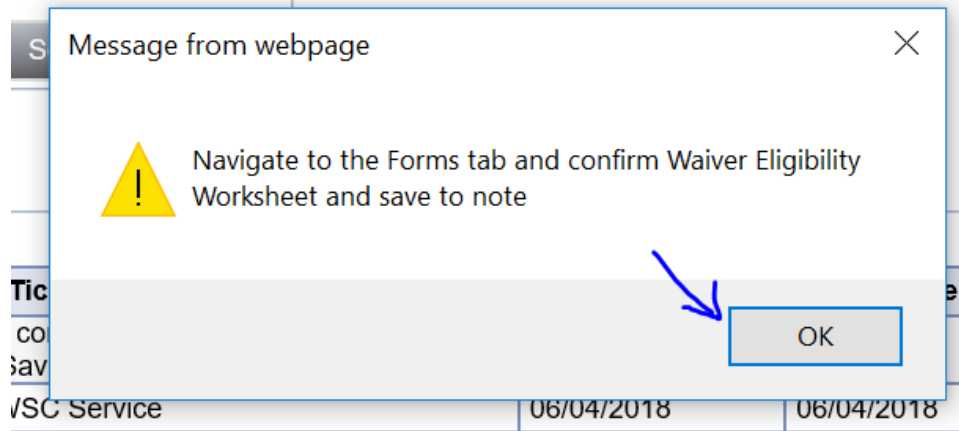




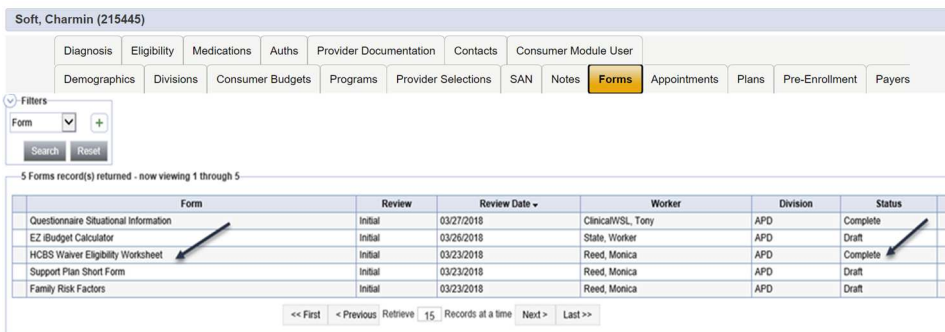
Tip

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

- 3. In the Tickler Queue, click to open the Tickler called Verify Completion and get Consumer signature on the Waiver Eligibility Worksheet and save to a Note.
 - a. A Message Tickler will open – Navigate to the Forms tab and confirm Waiver Eligibility Worksheet and save to Note. Click **OK**.



- b. To complete the Tickler, navigate to the consumer’s record and click on the **Forms** tab. Confirm that the Consumer has a completed HCBS Waiver Eligibility Worksheet in Complete Status



- c. With the open HCBS Waiver Eligibility Worksheet form displays, select Word Merge > HCBS Waiver Eligibility Worksheet. Print the document and get the necessary signatures.

opd iConnect John Sheppard
Last Updated by jBuck
at 9/14/2018 11:10:40 AM **Forms**

File Reports Word Merge

HCBS Waiver Eligibility [HCBS Waiver Eligibility Work Sheet](#)

Consumer Forms

Review *	Initial	Worker *	Buck, Jennifer	Details
Review Date *	09/14/2018	Status *	Complete	
Division *	APD	Provider/Program *	WSC Agency 1	Details
Approved By	Buck, Jennifer	Approved Date	09/14/2018	

HCBS WAIVER ELIGIBILITY WORKSHEET

Client First Name: John

Client Last Name: Sheppard

* Social Security Number: XXX-XX-6355

Region: NORTHWEST

Support Plan Effective Date: 09/01/2018

4. Then, after obtaining the necessary signatures, scan the Worksheet. Attach the signed HCBS Waiver Eligibility Worksheet to the consumer's record. To do so, click **Notes > File > Add Note**. In the new Note record, update the following fields:
 - a. Division = APD
 - b. Note Type = Waiver Enrollment
 - c. Note Subtype = Signed Waiver Eligibility Worksheet
 - d. Status = Complete
5. When finished, click **File > Save and Close Note**
6. Navigate back to the Tickler Queue and click **Complete** next to the Tickler
7. In the Tickler Queue, click to open the Tickler called "Verify Medicaid Eligibility Type."
8. A Message Tickler will open – Navigate to the Eligibility tab to confirm Medicaid Eligibility. Click **OK**.
9. From the consumer's record, click on the **Eligibility** tab to confirm if the Consumer is Medicaid Eligible based on the records that were added automatically from the 270/271 eligibility interface with FMMIS.

MY DASHBOARD **CONSUMERS** PROVIDERS INCIDENTS CLAIMS SCHEDULER UTILITIES REPORT

Reed, Test (10002)

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

Demographics Divisions Consumer Budgets Programs Provider Selections SAN Notes Forms Appointments Plans

Filters

Payer Name +

Search Reset

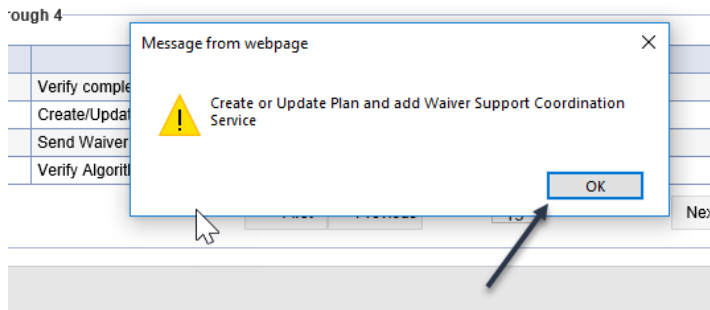
5 Eligibility record(s) returned - now viewing 1 through 5

Payer Name	Index Code	Subsubject Code	Eligibility Type	Start Date	End Date	Status	
Medicaid	Statewide	Medicaid	Waiver	03/01/2019	03/31/2026	Active	3/6/2019
Medicaid	Statewide	Medicaid	Waiver	01/01/2019	01/31/2019	Active	1/22/2019

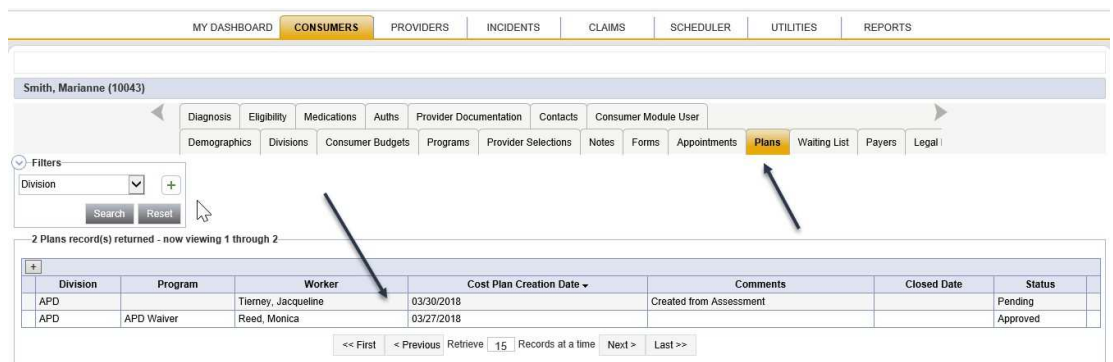
- i. Back in the Tickler Queue, hover over the arrow next to the Tickler to click **Complete**.

10. In the Tickler Queue, click to open the next Tickler called “Create/Update Plan add WSC Service”

- i. A Message Tickler will open – “Create or Update Plan and add Waiver Support Coordination Service.” Click **OK**



- ii. To complete the Tickler, navigate to the Consumer’s record and click on the Consumer’s existing Cost



Plan to Open it:

- iii. In the new Plan record, ensure that the following fields are up to date:
 1. “Division” = APD
 2. “Status” = Draft
 3. “Cost Plan Begin Date” = Date that the WSC began working with the Consumer
 4. “Cost Plan End Date” = End of the fiscal year

File

Plan Details

Division * APD ▾

Program ▾

Worker Reed, Monica ▾

Cost Plan Creation Date *

Comments

Status * Draft ▾

Cost Plan Begin Date 03/27/2018

Cost Plan End Date

- iv. When finished, click **File > Save and Add Planned Service**:

File

- Spell Check
- Save and Add Need
- Save and Add Planned Service**
- Save Plan
- Save & Close Plan
- Copy From Previous
- Close Plan Information

APD ▾

▾

Reed, Monica ▾

Status * Draft ▾

Cost Plan Begin Date 03/27/2018

Cost Plan End Date

- v. A new Planned Service record will open. Add the appropriate Waiver Support Coordination service to the record and click **File > Save and Close Planned Service** and **File > Save and Close Plan**. See Chapter 11|Cost for additional details on adding Planned Services.

NOTE: WSCs will want to ensure the plan is linked to the budget and passes plan validation in order to generate and authorization for waiver support coordination. For more information regarding plan validation, please refer to that section of Chapter 10.

File

Planned Services

Division: APD

Begin Date: 01/01/2019

End Date: 06/30/2019

IndexCode	Index Description	SubObject	SubObject Description
Statewide	Statewide	Waiver	iBudget Waiver

Service Ratio: [v]

Consumer County: ALACHUA

Provider Rate Type: Agency

Service Code: G9012-UC

Service Description: (4270) Support Coordination

Unit Type: Month

Units Per: 1

Units of Measure: Month - Round Up

Rate: \$148.69

Total No of Units: 6

Max Amount: \$892.14

Amount Requested: []

Provider ID: 10035 [Details](#)

Provider: WSC Agency1

Comments: planned service comments go here

Contract Number: []

Planned Service Status: Proposed

vi. Back 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	Create/Update Plan add WSC Service	03/27/2018	03/27/2018		New	Reed, Monica
Smith, Marianne	10043	Send Waiver Enrollment Request	03/27/2018	03/27/2018		New	Cancel
Smith, Marianne	10043	Verify Algorithm Amount from EZ iBudget Calculator	03/27/2018	03/27/2018		New	Edit

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

Reassign
Complete
View Consumers Record

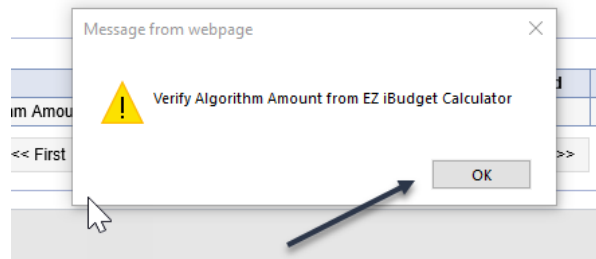
11. In the Tickler Queue, hover over the arrow next to the Tickler called "Verify algorithm amount from EZ iBudget Calculator" and click **Open**:

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Verify Algorithm Amount from EZ iBudget Calculator	03/27/2018	03/27/2018		New	Reed, Monica

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

i. A Message Tickler will open – "Verify Algorithm Amount from EZ iBudget Calculator." Click **OK**.



NOTE: The purpose of verifying the Algorithm Amount is to ensure that the EZ iBudget Calculator has the correct living setting and situation identified

EZ iBudget Calculator

First Name*

M.I.

Last Name*

Area/Region*

Update required in following situations?* →

Select Client's Living Setting* →

Client's Current Age*

- ii. To complete the Tickler, navigate to the Consumer's record and click on the **Forms** tab.

Smith, Marianne (10043)

Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Module User

Demographics Divisions Programs Provider Selections Notes **Forms** Appointments Plans Waiting List Payers

Filters
Form

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

Form	Review	Review Date	Worker	Division	Status
Questionnaire Situational Information	Initial	03/27/2018	ClinicalWLSL, Tony	APD	Complete
EZ iBudget Calculator	Initial	03/26/2018	Slate, Worker	APD	Draft
HCBS Waiver Eligibility Worksheet	Initial	03/23/2018	Reed, Monica	APD	Complete
Support Plan Short Form	Initial	03/23/2018	Reed, Monica	APD	Draft
Family Risk Factors	Initial	03/23/2018	Reed, Monica	APD	Draft

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

- iii. Open the existing "EZ iBudget Calculator" form and scroll down to view the "Algorithm Amount"

Algorithm Amount*	\$34682.12
Proportion Factor	1.00288
ALLOCATION ALGORITHM AMOUNT (use this value)*	\$34782.00
QSI Behavioral (QSI25-30) Sum*	0
QSI Functional (QSI14-24) Sum*	6

- iv. Note the “Allocation Algorithm Amount”
- v. When finished, click **File > Close Forms**
- vi. Back in the Tickler Queue, hover over the arrow next to the Tickler to click **Complete**:

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Smith, Marianne	10043	Verify Algorithm Amount from EZ iBudget Calculator	03/27/2018	03/27/2018		New	Reed, Monica

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

Cancel
 Edit
 Reassign
 Complete
 View Consumers Record

12. Also, upon saving the Program record, a Workflow Wizard triggers with six Ticklers assigned to the Waiver Support Coordinator and will be outlined in the section in the Chapters related to the Support Plan (Chapter 10) and Cost Plan (Chapter 11).

- a. Initiate Cost Plan - *Assigned to WSC, Due Immediately*
- b. Complete “Person-Centered Support Plan” - *Assigned to WSC, Due Immediately*
- c. Complete Amount Implementation Meeting - *Assigned to WSC, Due Immediately*
- d. Upload Support Planning Collateral Documents to Note - *Assigned to WSC, Due Immediately*
- e. Complete Cost Plan - *Assigned to WSC, Due in 45 Days*
- f. Eligibility Worksheet Reminder - *Assigned to WSC, Due in 45 Days*