



State of Florida
Agency for Persons with Disabilities

APD iConnect
Behavioral Services Training Manual Version 6
8/11/23

Behavioral Services

Table of Contents

Introduction.....	4
1. BASP Approval Process.....	5
1a. Behavior Analysis Service Provider Selection Process.....	5
1b. Behavior Analysis Service Provider Assigned	8
1c. Behavior Analysis Assessment (BAA) Scheduled.....	10
1d. Behavior Analysis Assessment (BAA) Completed	12
1e. Monitoring Completion by WSC	18
Completed Within 30 Days.....	20
Not Completed Within 30 Days	21
1f. Monitoring Completion by Behavior Analysis Service Provider	23
1g. New Behavior Analysis Service Provider for BASP	24
1h. BASP Completion.....	30
1i. Monitoring Completion by WSC	35
Completed Within 90 Days.....	36
Not Completed Within 90 Days	36
1j. LRC Preliminary Review.....	39
1ji. BASP Criteria Met	42
1jii. BASP Criteria Not Met	44
1k. LRC Meeting.....	46
1ki. Approved	50
1kii. Approved with Modifications	53
1kiii. Not Approved	62
2. Service Eligibility Review Process	71
2a. BASE Requested.....	71
2b. BASE Completed.....	74
2bi. Consumer Meets Criteria for Behavioral Services Eligibility	77
2bii. Consumer Meets Criteria for Eligibility with a Decrease in Services.....	80
2biii. Consumer Does Not Meet Criteria for Eligibility. Additional Documentation Required.	84
3. Increase in Behavioral Services.....	89
3a. BASE Requested.....	89
3b. BASE Completed.....	91

Behavioral Services

3bi. Consumer Meets Criteria for Behavioral Services Increase.....	94
3bii. Consumer Does Not Meet Criteria for Behavioral Services Increase. Additional Documentation Required.	97
3biii. Consumer Meets Criteria for Eligibility with a Decrease in Services	101
4. Completion of Behavior Analysis Service Quarterly Report (BASQR) Process	106
1 st Quarter BASQR	106
2 nd Quarter BASQR.....	111
3 rd Quarter BASQR	112
5. Report Use of Reactive Strategies	117
6. Reactive Strategies Event Review and Follow Up.....	119
6a. Corrections Required.....	119
6b. Follow Up Required.....	126
6bi. Follow Up During LRC Meeting	127
6bii. Follow Up via Scheduled Meeting	128
6biii. Follow Up via a Note.....	133
7. State Office Reactive Strategies (RS) Event Follow-Up and CMS Reporting	138
8. As Needed: Word Merges.....	141
Generating the Word Merge	141
No Edits Needed	142
Edits Needed	143

Introduction

Behavior analysis services are provided to assist recipients to learn new, or increase existing, functionally equivalent replacement skills directly related to existing challenging behaviors. Challenging behaviors include those behaviors exhibited by the recipient that pose risk of harm to the recipient or others (i.e., aggression, self-injury, property destruction, behaviors that prevent inclusion in normal settings, or behaviors that the recipient does not exhibit with sufficient proficiency or skill to prevent harm to the recipient or others, including resisting basic hygiene, and refusal to take medications).

Behavior analysis includes the design, implementation, and evaluation of systematic environmental modifications that assist in understanding a recipient's behavior and to produce significant change in the recipient's behavior that is socially meaningful. Behavior analysis services should be initiated with a plan for maintaining and generalizing behavioral improvements, as well as an initial criteria for the reduction and fading of behavioral services. As caregivers show increasing competence in delivering the implementation plan, and the recipient's target behaviors are responding to effective treatment, the plan should set forth target behavior criteria to be achieved by the recipient that lead to a specified reduction in the level of service. Subsequent to the initial plan, an updated fading plan must be addressed, at a minimum, as part of the annual behavior analysis service plan (BASP) update.

There are seven behavioral services workflow processes that will be covered in this manual. These workflows begin with the WSC identifying the need for behavioral services for the consumer.

1. BASP Approval Process which includes the LRC Case Review process
2. Service Eligibility Review Process
3. Increase in Behavioral Services Process
4. Completion of Behavior Analysis Service Quarterly Report (BASQR) Process
5. Report Use of Reactive Strategies Process
6. Reactive Strategies (RS) Event Review and Follow-Up Process
7. State Office Reactive Strategies (RS) Event Follow-Up and CMS Reporting Process

1. BASP Approval Process

The BASP approval process includes the following steps:

1. The Waiver Support Coordinator (WSC) completes behavioral analysis service provider selection process with consumer to pick the behavior analysis service provider to complete Behavior Analysis Assessment (BAA).
2. The WSC creates the Provider selection record and authorization.
3. The behavior analysis service provider completes Behavior Analysis Assessment (BAA) form in APD iConnect.
4. The WSC will use Workflow Wizards to monitor the completion of the Behavior Analysis Assessment (BAA) within 30 days of the first billed date.
5. The WSC confirms the behavioral analysis service provider to provide the behavior analysis service, complete the BASP and create an authorization if needed.
6. The behavior analysis service provider completes the BASP form in APD iConnect.
7. The WSC will use Workflow Wizards to verify the BASP is completed (e.g. form is present) within 90 days of the first billed date.
8. The behavior analysis service provider submits the BASP for Local Review Committee (LRC) review.
9. LRC Chair completes the Preliminary Review and informs the behavior analysis service provider of the date of the LRC meeting.
10. The LRC meeting is held and the BASP is “approved”, “not approved”, or “approved with modifications”.
11. The behavior analysis service provider corrects and resubmits those that are “not approved” or “approved with modifications.”
12. If revised BASP is submitted timely and sufficiently addresses revision requirements, the BASP will be approved.
13. If revised BASP is not submitted timely, the revised BASP will be handled as new submission for LRC review and will be placed on the first available agenda within the timeframes set forth in 65G-4.
14. If revised BASP is submitted timely, but is insufficient, the behavior analysis service provider will be notified of any revisions that must still be made.

1a. Behavior Analysis Service Provider Selection Process

A member of the consumer’s circle of supports identifies a potential need for behavior services and informs the WSC. The WSC will take the appropriate steps in the PCSP/cost planning workflows.

Behavioral Services

The Waiver Support Coordinator (WSC) completes the provider selection process with consumer to pick the behavior analysis service provider who will complete the Behavior Analysis Assessment (BAA) and documents as a note in APD iConnect.

Role: WSC/CDC

1. The WSC schedules interviews with behavior analysis service providers based on the consumer's choice.
2. The WSC will create a note after each interview in APD iConnect. One note must be created for each interview. Navigate to the consumers record and select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - a. Program/Provider = the name of the WSC agency
 - b. Note Type = Consumer Choice – Provider Interview
 - c. Note SubType = Behavioral Services
 - d. Provider Interviewed = Enter the name of the behavior analysis service provider agency
 - e. Date Provider Interviewed = Select the date the interview occurred
 - f. Description = Selection Accepted + behavior analysis service provider name or Selection Denied + behavior analysis service provider name.
 - g. Status = Complete
 - h. Note = additional details about the interview if needed.

Behavioral Services

Notes Details	
Division *	APD ▼
Note By *	Buck, Jennifer ▼
Note Date *	07/03/2023
Program/Provider *	1 CARE LLC ▼ Details
Note Type *	Consumer Choice - Provider Interview ▼ *
Note Sub-Type	Behavioral Services ▼ *
Provider Interviewed	Dr. Happy
Date Provider Interviewed *	06/30/2023
Description	Selection Accepted - Dr. Happy
Note	B <i>I</i> <u>U</u> 16px A ▼ additional details about interview if needed
Status *	Complete ▼
Date Completed	07/03/2023

3. From the **File** menu, select **Save and Close Note**.
4. WSC creates new provider selection record for the behavior analysis service provider the consumer chooses. From the consumer's record, select the **Provider Selection** tab. From the **File** menu, select **Add Provider**. The Provider Details page displays. Update the following fields:
 - a. Provider = select the name of the behavior analysis service provider agency
 - b. Disposition = Open
 - c. Referral Type = Behavior
 - d. Provider Worker = search for and select the name of the behavior analysis service provider



Carrie Abner
 7/3/2023 11:49 AM

Provider

File

Division *	APD ▼	
Selected By	Buck, Jennifer	... Clear Details
Selection Date	07/03/2023	
Provider *	ABA SOLUTIONS, INC.	... Clear
Referral Type *	Behavior ▼	
Disposition *	Open ▼	
Disposition Date	07/03/2023	
Provider Worker *	Buck, Jennifer	... Clear Details
eMAR Date (if applicable)	07/03/2023	
Comments		

- From the **File** menu, select **Save and Close Provider**.
- Once the behavior analysis service provider agency is known, the AIM process is completed, the budget is updated, then the cost plan can be updated by the WSC.
- The WSC will follow the cost plan process to add the necessary planned services, validate, and create authorizations for the assessment. If the budget is insufficient for the requested services, follow the SAN process. Part of the cost plan process includes the request for and completion of the BASE. Complete the [Service Eligibility Review Process](#) section.

1b. Behavior Analysis Service Provider Assigned

The behavior analysis service provider agency is selected by the consumer and the WSC creates the authorization. The agency owner will monitor for incoming authorizations and assign the behavior analysis service provider that will complete the Behavior Analysis Assessment (BAA) and notify him/her via a note in APD iConnect. If the behavior analysis service provider is a solo provider, the assignment process can be skipped.

Role: Service Provider

- The agency owner will be notified of a new authorization by the WSC. The agency owner can also monitor the Authorizations tab on the Provider record for the agency in APD iConnect. Select the **Provider** tab. Search for and select the agency's provider record.
- Select the **Authorizations** tab.

Behavioral Services

- A list of authorizations created for the agency are listed. For each consumer in the list, assign a behavior analysis service provider.

ABA SOLUTIONS, INC. (14556)

MY DASHBOARD | CONSUMERS | PROVIDERS | CLAIMS

Workers | Services | Provider ID Numbers | Beds | Linked Providers | Service Area

Providers | CAP | EVV Activities | EVV Scheduling | Forms | Contracts | Enrollments | **Authorizations** | Notes | Appointments | Credentials

Filters
Division:

531 Authorizations record(s) returned - now viewing 1 through 15

	Division	Case No	Consumer	Auth ID	Auth Start Date	Auth End Date	Auth Status	Last Updated
☒	APD	15354	Charles	666685	07/01/2023	06/30/2024	Approved	3/20/2023 4:36:17 PM
☒	APD	15637	Stephanie	667153	07/01/2023	06/30/2024	Approved	3/20/2023 4:36:17 PM

- Notify the behavior analysis service provider of the assignment via a Note. Copy the Case No from the Authorizations list. Select the **Consumers** tab and search for the consumer from the **Quick Search**. Paste the copied Case No and select **Search**.

Quick Search

☐ Participating

- The consumer's record opens. Select the **Notes** tab.
- From the **File** menu, select **Add Notes**. The Note Details page displays. Update the following fields:
 - Program/Provider = enter the name of the behavior analysis service provider agency
 - Note Type = Behavioral Services
 - Note Sub Type = Service Referral
 - Description = BAA assigned
 - Notes = details about the assignment if needed
 - Status = Complete
 - Recipient = behavior analysis service provider

Behavioral Services

The screenshot shows the 'Notes Details' form in the APD iConnect system. The form includes fields for Division (APD), Note By (Buck, Jennifer), Note Date (07/18/2023), Program/Provider (ABA SOLUTIONS, INC.), Note Type (Behavioral Services), Note Sub-Type (Service Referral), and Description (BAA assigned). A rich text editor for the Note content is visible, containing the text 'details about the assignment if needed'. The Status is set to Complete and the Date Completed is 07/18/2023.

Notes Details	
Division *	APD
Note By *	Buck, Jennifer
Note Date *	07/18/2023
Program/Provider *	ABA SOLUTIONS, INC.
Note Type *	Behavioral Services
Note Sub-Type *	Service Referral
Description	BAA assigned
Note	details about the assignment if needed
Status *	Complete
Date Completed	07/18/2023

- From the **File** menu, select **Save and Close Notes**.

Role: Service Provider Worker

- The behavior analysis service provider will monitor **My Dashboard > Notes > Complete** for notification that an authorization for a BAA has been assigned.

The screenshot shows the 'MY DASHBOARD' section for 'CONSUMERS'. It features a table with two columns: 'CONSUMERS' and 'PROVIDERS'. The 'CONSUMERS' column has a table with rows for Division, Provider Selections, and Notes. The 'PROVIDERS' column has a table with rows for Ticklers. The 'Notes' table shows 5 Complete and 5 Pending notes. The 'Ticklers' table shows 1 Tickler.

MY DASHBOARD	
CONSUMERS	
Division	
Provider Selections	
Notes	
Complete	5
Pending	5

PROVIDERS	
Ticklers	
Ticklers	1

- The behavior analysis service provider will schedule an appointment with the consumer to complete the BAA.

1c. Behavior Analysis Assessment (BAA) Scheduled

The behavior analysis service provider receives notification of his/her authorization and reaches out to the consumer to schedule the assessment. The behavior analysis service provider can document the appointment in APD iConnect, but it is not required.

Role: Service Provider, Service Provider Worker

- Navigate to the consumer's record and click on the **Appointments** tab > **File > Add Appointment**.

Behavioral Services

2. The Appointment Details page displays. Update the following fields:
 - a. Division = APD
 - b. Program = select the name of the behavioral analysis service provider agency
 - c. Start Date = enter date
 - d. Start Time = enter time
 - e. End Date = enter date
 - f. End Time = enter time
 - g. Appointment Type = Behavior Analysis Assessment
 - h. Status = Scheduled
 - i. The remaining fields on this page are optional.

Appointment Detail	
Division	APD
Program	ABA SOLUTIONS, INC. Details
Start Date *	07/08/2023
Start Time	11:00 AM
End Date	07/08/2023
End Time	12:00 PM
Travel Time	
Preparation Time	
Type	Behavior Analysis Assessment *
Sub Type	
Subject	
Appointment Summary	500 characters remaining
Additional Information (Private)	500 characters remaining
Reason	
Location	
Status *	Scheduled
High Priority	☐

3. When finished, click **File > Save Appointment**.



Note

Other types of appointments can also be scheduled as needed. For example, LRC Meeting, Clinical and Other. If “Clinical” Type is selected, pick the “Behavior Analyst” Sub Type. The other appointment types do not have Sub Types.

Type	Clinical *
Sub Type	Behavior Analyst

4. Upon saving the new Appointment record, the Appointment record will refresh and display the **Add Attendee** tab.

Behavioral Services

File

Appointment	Appointment Detail
Attendee List	Division
Add Attendee	Program
	Start Date *
	Start Time

- Click **Add Attendee**.
- Scroll to find your Worker record. Select the record and click **Add**. Note that you can use the CTRL key to select multiple workers before clicking **Add**.
- When finished, click **File > Save and Close Attendee**.

oConnect Carrie Abner | Add Attendee
7/3/2023 11:56 AM

File

Appointment	Participants	Non-Participants
Attendee List		Filter: All Active Workers
Add Attendee	Buck, Jennifer	McCORMICK, MELISSA -oliver, tatyana 1, Norma Aaron, Arianna Aaron, Felicia ABAD, BERKYS Abad, Berkys Abad, Mima Abadin, Carmen ABADIN, CARMEN Abarzua, Michelle Abbott, David Abbott, Kristin Abdul-Malik, Jameela Abdullah-Simmons, Haniyyah Abercrombie, Shirley Abernathy, Jennifer ABILO, AMBER Abilo, Amber
		< Add << Add All Remove > Remove All >>

- The Appointment will now display in the Attendee's **My Dashboard > Consumers > Appointments** page.

MY DASHBOARD **CONSUMERS**

CONSUMERS	PROVIDERS
Division	Ticklers
Provider Selections	Ticklers 1
Notes	
Ticklers	
Appointments	
Scheduled 1	

1d. Behavior Analysis Assessment (BAA) Completed

The behavior analysis service provider completes the assessment and completes the Behavior Analysis Assessment (BAA) form in

Behavioral Services

APD iConnect. The WSC will use Workflow Wizards to monitor completion within 30 days of the first billed date.

Role: Service Provider, Service Provider Worker

1. After the assessment is complete, the behavior analysis service provider will complete the Behavior Analysis Assessment form in APD iConnect. Navigate to the consumer's record and select the **Forms** tab. From the **File** menu, select **Add Form**. Select **"Behavior Analysis Assessment."** The Form Details page displays. Update the following fields:
 - a. Review = Initial
 - b. Review Date = defaults to today
 - c. Division = defaults to APD
 - d. Worker = pre-populated with your name
 - e. Provider/Program = Name of the behavior analysis service provider's agency
 - f. Status = defaults to Draft. This will be changed to Complete later in the workflow.

APD iConnect

Carrie Abner | Forms
7/17/2023 8:00 PM

File

Please Select Type: Behavior Analysis Assessment

Consumer Forms

Review * Initial

Review Date * 07/17/2023

Division * APD

Approved By

Worker * Buck, Jennifer

Status * Draft

Provider/Program * ABA SOLUTIONS, INC.

Approved Date

Behavior Analysis Assessment

Date of Report * 06/13/2023

Consumer's First Name: Carrie

Consumer's Last Name: Abner

Date of Birth: 07/12/1997

Author1 (Name and Credentials):* Dr. Happy, ABA

2. Answer the questions in the form.



Note

The Maladaptive Behavior questions are conditionally visible. Be sure to answer the "Add Another Maladaptive Behavior..." question to display fields for each additional behavior. Up to 15 Maladaptive Behaviors can be added on this form.

Maladaptive Behavior 1. Average Baseline Number:	
Maladaptive Behavior 1. Type of Measure	
Add Another Maladaptive Behavior 2?	☐ Yes ☐ No

Behavioral Services

3. Graphs must also be added to the Behavior Analysis Assessment form. This is done from the **Note icon** in the header of the form.

Functional Behavioral Assessment 

Consumer Forms

Review *	As Needed ▼
Review Date *	07/03/2023 
Division *	APD ▼
Approved By	
Note	



Note

The form must be saved, at least one, to display the Note icon. Save the form by selecting the **File** menu, then select **Save Form**.

4. Click the **Note icon**. The Note Details page displays. Update the following fields:
 - a. Cost Plan Review Note = No
 - b. Note Type = Behavioral Services
 - c. Note Sub Type = Behavior Analysis Assessment
 - d. Description = Type of graph + time period it covers (e.g., BAA graph May – June 2023)
 - e. Notes = any additional details about the attached graphs
 - f. Status = Complete
 - g. Attachment = search for and select the document saved on your device.
 - Description = Once the document is selected, within the attachment window, add a Description of the attachment to indicate what the attachment contains and its purpose or use in this context.

File 20220901_APDF...g-Guide-V1.docx

File Name ☒ from uploaded file ☐ create new

Description

Category

Note: Maximum size for attachment is set to 18.46 MBytes.

Behavioral Services



Note

iConnect is an encrypted system and providers should not password protect documents when uploading into the system. Password protecting them results in APD not being able to open the documents and then the provider will need to be contacted and asked to resubmit the documentation.

- From the **File** menu, select **Save and Close Notes**.

The screenshot shows the iConnect Behavior Analysis Assessment form. The 'Consumer Forms' section includes fields for Review (Initial), Review Date (07/17/2023), Division (APD), Approved By, and Note. The 'Behavior Analysis Assessment' section includes fields for Date of Report (06/13/2023), Consumer's First Name (Carrie), Consumer's Last Name (Abner), Date of Birth (07/12/1997), Author1 (Dr. Happy, ABA), Author2, Author3, and a checkbox for 'Do you need to add a Supervisor?'. The 'Behavior Analysis Assessment' section also includes a 'Note' field with a rich text editor and a 'Status' dropdown menu set to 'Complete'. The 'Date Completed' field is set to 07/17/2023. The 'Attachments' section shows a document titled 'iConnect_Behavioral_Services_Training_Guide_V3 7-3-23.docx' with a description 'BAA Graphs May - June 2023'.

- The page refreshes and you're returned to the Behavior Analysis Assessment form.
- Once all questions are answered and graphs attached as a Note, change the status of the form to **Complete**.



Note

Ensure information is correct and complete before saving in Complete status. The message below will display as a reminder when selecting Complete.

Itssbh1.mediware.com says

By changing the status of this record, all required fields must be completed before the record can be saved. Do you want to continue?

OK

Cancel

- From the **File** menu, select **Save and Close Form**.
- It's optional but if discussion is needed between the behavior analysis service provider and WSC, the behavior analysis service provider can also create a note for the WSC. From the consumer's record, select the **Notes** tab. From the **File** menu,

Behavioral Services

select **Add Note**. The Note Details page displays. Update the following fields:

- a. Program/Provider = the name of the behavior analysis service provider's agency
- b. Note Type = Behavioral Services
- c. Note Sub Type = Behavior Analysis Assessment
- d. Description = optional
- e. Note = enter additional details not already included in the BAA
- f. Status =
 - Pending - if the behavior analysis service provider needs a response from the WSC.
 - Complete - if the note is notification only and a response from the WSC is not needed.
- g. Recipient = WSC

The screenshot shows the 'Notes Details' form in the iConnect system. The form is titled 'Notes Details' and has a 'File' menu and 'Tools' button at the top. The form fields are as follows:

- Division: APD
- Note By: Buck, Jennifer
- Note Date: 07/18/2023
- Program/Provider: ABA SOLUTIONS, INC.
- Note Type: Behavioral Services
- Note Sub-Type: Behavior Analysis Assessment
- Description: optional
- Note: discussion initiated by the provider for the WSC
- Status: Pending
- Date Completed: (empty)

The top right of the page shows the user 'Carrie Abner' and the date '7/18/2023 7:23 PM'.

10. From the **File** menu, select **Save and Close Notes**.

Role: WSC/CDC

11. The WSC monitors **My Dashboard > Notes > Pending or Complete** for incoming notes.

Behavioral Services

The screenshot shows a dashboard with two main sections: CONSUMERS and PROVIDERS. The CONSUMERS section has three filters: Division (dropdown), Provider Selections (dropdown), and Notes (table). The PROVIDERS section has a filter: Ticklers (dropdown). The Notes table shows two rows: Complete (5) and Pending (5). The Ticklers dropdown shows one item: Ticklers (1).

CONSUMERS		PROVIDERS	
Division	▼	Ticklers	▶
Provider Selections	▼	Ticklers	1
Notes	▶		
Complete	5		
Pending	5		

12. The WSC locates the Behavioral Services > Behavior Analysis Assessment note from the behavior analysis service provider and opens it to review the content. The Note details page displays. If a response is needed, the WSC will update the following fields:

- Note = add a response to the behavior analysis service provider. Select **Append Text to Note**.
- Status =
 - Pending - if the WSC needs a response from the behavior analysis service provider.
 - Complete - if the note is notification only and a response from the behavior analysis service provider is not needed.
- Recipient = behavior analysis service provider

The screenshot shows the iConnect Notes Details page. The page has a header with the iConnect logo, user information (Carrie Abner, Last Updated by j buck@apdcares.org at 7/18/2023 7:44:37 PM), and a Notes tab. The main content area is divided into two sections: Notes Details and Note. The Notes Details section contains fields for Division (APD), Note By (Buck, Jennifer), Note Date (07/18/2023), Program/Provider (ABA SOLUTIONS, INC.), Note Type (Behavioral Services), Note Sub-Type (Behavior Analysis Assessment), and Description (optional). The Note section contains a text area with the note content: "On 7/18/2023 at 7:44 PM, Jennifer Buck wrote: discussion initiated by the provider for the WSC". Below the text area is a "New Text" section with a rich text editor and a text input field containing "response from the WSC back to the provider".

Notes Details

Division: APD

Note By: Buck, Jennifer

Note Date: 07/18/2023

Program/Provider: ABA SOLUTIONS, INC. [Details](#)

Note Type: Behavioral Services

Note Sub-Type: Behavior Analysis Assessment

Description: optional

Note

On 7/18/2023 at 7:44 PM, Jennifer Buck wrote:
discussion initiated by the provider for the WSC

New Text

response from the WSC back to the provider

Behavioral Services

Append Text to Note

Status * Pending

Date Completed

Attachments

Add Attachment

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient:

Clear

Name	Date Sent	Date Read	Status	Date Signed	
Reed, Monica	7/17/2023		Unread		Remove

13. From the **File** menu, select **Save and Close Notes**.

Role: Service Provider, Service Provider Worker

14. The behavior analysis service provider monitors **My Dashboard > Notes > Pending or Complete** for incoming notes.

MY DASHBOARD

CONSUMERS

CONSUMERS

PROVIDERS

Division

Provider Selections

Notes

Complete 5

Pending 5

Ticklers

Ticklers 1

15. The behavior analysis service provider locates the Behavioral Services > Behavior Analysis Assessment note from the WSC and opens it to review the content. The Note details page displays. When finished, select **File > Close Note**. If a response is needed to the WSC, repeat steps 9 and 10.

oconnect iConnect

Welcome, Jennifer Buck | Notes

7/17/2023 8:18 PM

File Tools

Filters

Status Equal To Pending AND

iConnect ID

Search Reset

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

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status	
59217	Abner, Carrie	Behavioral Services	Behavior Analysis Assessment	07/17/2023	optional	Buck, Jennifer	Pending	

1e. Monitoring Completion by WSC

The WSC will use workflow wizards to monitor the 30-day deadline for the behavior analysis service provider to complete the Behavior

Behavioral Services

Analysis Assessment. If the Behavior Analysis Assessment is not completed within 30 days of the first billed date, the WSC will notify the regional behavioral staff via a note and include additional information as to why it was not completed within the 30 days. The regional behavioral staff will follow up accordingly.

Role: WSC/CDC

When the provider selection record for the behavior analysis service provider was created, a workflow wizard triggered a tickler for the WSC to “Ensure the Behavior Analysis Assessment has been completed within 30 days of the first billed date.” This tickler will trigger whether the behavior analysis service provider completes the Behavior Analysis Assessment or not. In addition, when the behavior analysis service provider saves the Behavior Analysis Assessment form as complete, a Workflow Wizard triggers a second tickler notifying the WSC “The Behavior Analysis Assessment has been completed.”

1. The WSC will monitor **My Dashboard > Ticklers** for both ticklers.

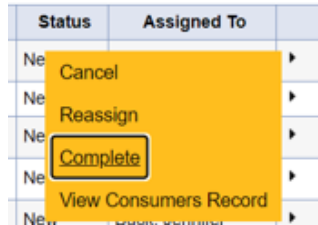
The screenshot shows the 'MY DASHBOARD' tab selected, with 'CONSUMERS' and 'PROVIDERS' sub-tabs. Under 'CONSUMERS', there are filters for Division, Provider Selections, Notes, and Ticklers (showing 36). Under 'PROVIDERS', there is a filter for Ticklers. The page also shows a 'File' section with a 'Filters' box containing status, date, and search options. Below the filters, a table displays 51 ticklers, with the first two visible:

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Abner, Carrie	59217	Ensure the Behavior Analysis Assessment has been completed within 30 days of the first billed date.	07/17/2023	08/19/2023		New	Buck, Jennifer
Abner, Carrie	59217	The Behavior Analysis Assessment has been completed.	07/17/2023	09/15/2023		New	Buck, Jennifer

2. The WSC can use both ticklers to monitor if the Behavior Analysis Assessment is completed within 30 days of the first billed date.

Completed Within 30 Days

- a. If the “Behavior Analysis Assessment has been completed” tickler is received within 30 days of the first billed date, the first and second ticklers can be marked as complete. Ticklers are marked as complete by selecting the **tickler flyout menu** then select **Complete**.



- b. The WSC will review the Behavior Analysis Assessment for behavioral services that have been recommended, if any. From the **tickler flyout menu**, select the shortcut to **View Consumers Record**. Select the **Forms** tab and select the completed Behavior Analysis Assessment from the list.



- c. Review the **Intervention Recommendations** section.

Intervention Recommendations:

Select Your Recommendation:

Please select the most appropriate recommendation:*

Behavioral Services Recommended

Please give brief description and rationale of your proposed Behavior Plan interventions to address the following target behaviors (Based upon functional analysis of target behaviors or functional response classes):

a) Possible procedures that might be used for each target behavior are listed:*

procedures

b) Includes replacement behaviors for behaviors targeted for reduction:*

replacement behaviors

1490 characters remaining

- d. If behavioral services are recommended, the WSC will update the current cost plan or complete the SAN process depending on availability of funds. Part of the cost plan process includes the request for and completion of the BASE. Complete the [Service Eligibility Review Process](#) section. Proceed to the [BASP Completed section](#).

- e. If behavioral services are not recommended, the process ends. The WSC will not create an authorization for the BASP. The WSC will close the behavior analysis service provider selection record and update the cost plan. The WSC will note that services were not needed in their next Progress Note.

Not Completed Within 30 Days

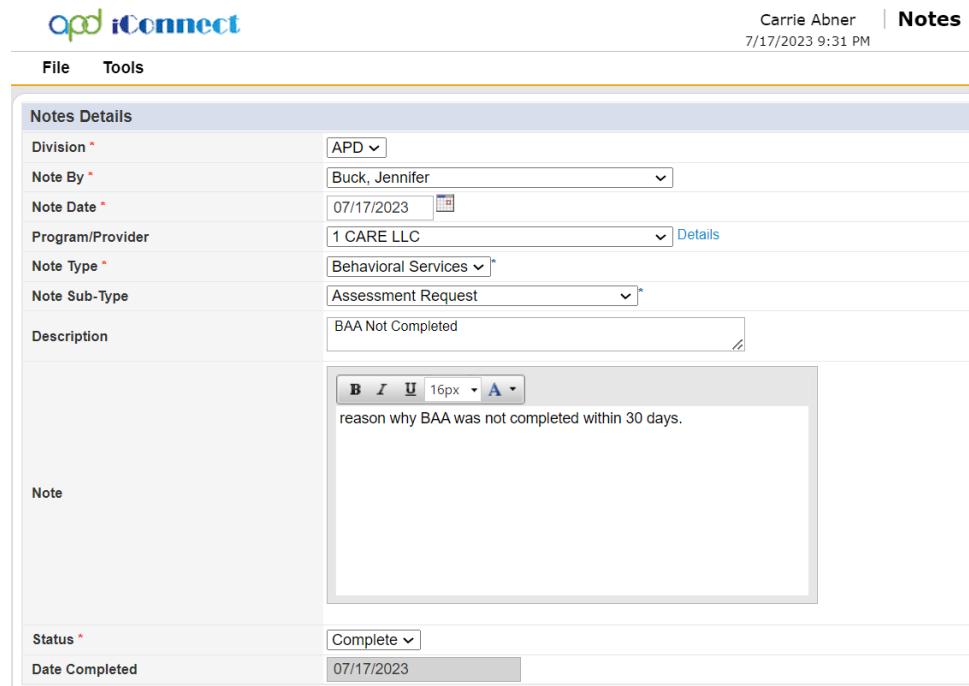
- a. If the “Behavior Analysis Assessment has been completed” tickler is NOT received within 30 days of the first billed date, the WSC will review and assess the reasons why with the behavior analysis service provider outside of APD iConnect and document in a note, notifying the region and agency owner. One of four scenarios can occur:
 - 1. The behavior analysis service provider will complete the BAA late. WSC will indicate the reason why it was completed late in the note for the region behavior analyst (Region Clinical Workstream Worker) and agency owner.
 - 2. The behavior analysis service provider cannot complete the BAA. WSC will complete the provider selection process again with the consumer and notify the region behavior analyst (Region Clinical Workstream Worker) and agency owner via a note.
 - 3. Client refused the service. The WSC will follow up with the consumer and indicate the reason services were refused in the note for the region behavior analyst (Region Clinical Workstream Worker) and agency owner. The WSC may complete the provider selection process again with the consumer depending on the situation.
 - 4. The behavior analysis service provider is not responsive. The WSC will notify the region behavior analyst (Region Clinical Workstream Worker) and QA Workstream Worker who will assess if a plan of remediation is needed. Concurrently, the WSC will complete the provider selection process again with the consumer.
- b. To create the note, from the consumer’s record, select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - a. Note Type = Behavioral Services
 - b. Note SubType = Assessment Request.

Behavioral Services

If the provider is not responsive, use the Quality Assurance Note SubType

- c. Description = BAA Not Completed
- d. Status = Complete
- e. Note = reason why it was not completed in 30 days
- f. Recipient = Regional behavioral staff and agency owner

- c. From the **File** menu, select **Save and Close Notes**.



iConnect Carrie Abner | **Notes**
7/17/2023 9:31 PM

File **Tools**

Notes Details

Division *	APD ▼
Note By *	Buck, Jennifer ▼
Note Date *	07/17/2023
Program/Provider	1 CARE LLC ▼ Details
Note Type *	Behavioral Services ▼ *
Note Sub-Type	Assessment Request ▼ *
Description	BAA Not Completed
Note	B I U 16px A ▼ reason why BAA was not completed within 30 days.
Status *	Complete ▼
Date Completed	07/17/2023

Notes Details

Division * APD

Note By * Buck, Jennifer

Note Date * 07/18/2023

Program/Provider * 1 CARE LLC Details

Note Type * Behavioral Services

Note Sub-Type Quality Assurance

Description BAA Not completed

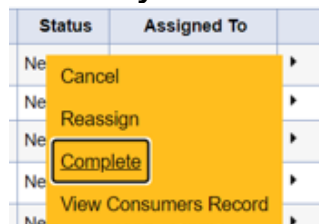
Note

Provider not responsive

Status * Complete

Date Completed 07/18/2023

- d. Once the WSC has completed his/her follow-up the “Ensure the Behavior Analysis Assessment has been completed within 30 days of the first billed date” tickler can be marked as complete. Ticklers are marked as complete by selecting the **tickler flyout menu** then select **Complete**.



- e. If the behavior analysis service provider will complete the BAA late, proceed to the [Behavior Analysis Assessment Completed section](#).
- f. If the behavior analysis service provider cannot complete the BAA, proceed to the [Behavior Analysis Service Provider Selection Process section](#).
- g. If the client refused the service and a new provider will be selected, proceed to the [Behavior Analysis Service Provider Selection Process section](#).
- h. If the behavior analysis service provider is not responsive, proceed to the [Behavior Analysis Service Provider Selection Process section](#).

1f. Monitoring Completion by Behavior Analysis Service Provider

Role: Service Provider

The behavior analysis service providers will not receive a tickler, but the agency owner can monitor the completion of the Behavior Analysis Assessment within 30 days from the first billed date with data from APD iConnect.

1. The agency owner can obtain the authorization start date from the Authorizations tab on the Provider record for the agency in APD iConnect and compare it to the first billed date from FMMIS.
2. Select the **Provider** tab. Search for and select the agency's provider record.
3. Select the **Authorizations** tab.
4. A list of authorizations created for the agency are listed. For each consumer in the list, note the authorization start date.

MY DASHBOARD CONSUMERS PROVIDERS CLAIMS									
ABA SOLUTIONS, INC. (14556)									
Workers	Services	Provider ID Numbers	Beds	Linked Providers	Service Area				
Providers	CAP	EVV Activities	EVV Scheduling	Forms	Contracts	Enrollments	Authorizations	Notes	Appointments
Filters Division + Search Reset									
531 Authorizations record(s) returned - now viewing 1 through 15									
	Division	Case No	Consumer	Auth ID	Auth Start Date	Auth End Date	Auth Status	Last Updated	
+	APD	15354	Charles	666685	07/01/2023	06/30/2024	Approved	3/20/2023 4:36:17 PM	
+	APD	15637	Stephanie	667153	07/01/2023	06/30/2024	Approved	3/20/2023 4:36:17 PM	

5. Compare the authorization start date to the FMMIS first billed date. The Behavior Analysis Assessment should be completed after the authorization start date and within 30 days of the first billed date.

1g. New Behavior Analysis Service Provider for BASP

If the behavior analysis service provider who completed the Behavior Analysis Assessment (BAA) will NOT be the one completing the BASP, the WSC will be notified via a note. The WSC will close the provider selection record for the behavior analysis provider who completed the BAA, update the cost plan, then complete the provider selection process again for a new behavior analysis service provider to complete the BASP and on-going behavior analysis treatment and monitoring. If the new behavior analysis service provider works for a different agency than the original provider, the WSC will also print a copy of the BAA and attach it to a note for the new behavior analysis service provider.

Behavioral Services

Role: Service Provider, Service Provider Worker

1. If the behavior analysis service provider who completed the Behavior Analysis Assessment cannot be the provider to provide behavioral services to the consumer, he/she will notify the WSC via a note. From the consumer's record, select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - a. Program/Provider = the name of the behavior analysis service provider's agency
 - b. Note Type = Behavioral Services
 - c. Note Sub Type = Behavior Analysis Assessment
 - d. Description = optional
 - e. Note = refer to another behavior analysis service provider to provide behavioral services
 - f. Status =
 - Pending - if the behavior analysis service provider needs a response from the WSC.
 - Complete - if the note is notification only and a response from the WSC is not needed.
 - g. Recipient = WSC

Notes Details

Division *

Note By *

Note Date *

Program/Provider * [Details](#)

Note Type *

Note Sub-Type *

Description

Note

B I U 16px A

example: refer to another behavior analysis service provider to provide behavioral services

Status *

Date Completed

Attachments

[Add Attachment](#)

Document	Description	Category	Action
here are no attachments to display			

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	7/17/2023		Unread		Remove

2. From the **File** menu, select **Save and Close Notes**.

Role: WSC/CDC

3. The WSC monitors **My Dashboard > Notes > Pending or Complete** for incoming notes.

The screenshot shows a web interface with a top navigation bar containing 'MY DASHBOARD' (highlighted) and 'CONSUMERS'. Below this, there are two main columns: 'CONSUMERS' and 'PROVIDERS'. The 'CONSUMERS' column has three sections: 'Division' with a dropdown arrow, 'Provider Selections' with a dropdown arrow, and 'Notes' with a dropdown arrow. The 'Notes' dropdown is open, showing 'Complete' with a count of 5 and 'Pending' with a count of 5. The 'PROVIDERS' column has a 'Ticklers' section with a dropdown arrow and a count of 1.

CONSUMERS		PROVIDERS	
Division	▼	Ticklers	▼
Provider Selections	▼	Ticklers	1
Notes	▼		
Complete	5		
Pending	5		

4. The WSC locates the Behavioral Services > Behavior Analysis Assessment note from the behavior analysis service provider and opens it to review the content. The Note details page displays. If a response is needed, the WSC will update the following fields:
- Note = add a response to the behavior analysis service provider. Select **Append Text to Note**.
 - Status =
 - Pending - if the WSC needs a response from the behavior analysis service provider.
 - Complete - if the note is notification only and a response from the behavior analysis service provider is not needed.
 - Recipient = behavior analysis service provider

Behavioral Services



Carrie Abner
Last Updated by jrbuck@apdcares.org
at 7/17/2023 8:13:35 PM

Notes

FileTools

Notes

Notes Details

Division *

APD

Note By *

Buck, Jennifer

Note Date *

07/17/2023

Program/Provider *

ABA SOLUTIONS, INC.

Details

Note Type *

Behavioral Services

Note Sub-Type *

Behavior Analysis Assessment

Description

optional

Note

On 7/17/2023 at 8:13 PM, Jennifer Buck wrote:
example: refer to another behavior analysis service provider to provide behavioral services

New Text

B I U 10pt A

WSC adds response to behavior analysis service provider if needed

Append Text to Note

Status *

Pending

Date Completed

Attachments

Add Attachment

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient:

Clear

Name	Date Sent	Date Read	Status	Date Signed	
Reed, Monica	7/17/2023		Unread		Remove

- From the **File** menu, select **Save and Close Notes**.

Role: WSC/CDC

- The WSC completes the provider selection process again with the consumer.
- The WSC will create a note after confirming the provider with the consumer. Navigate to the consumers record and select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - Provider/Program = the name of the WSC agency
 - Note Type = Consumer Choice – Provider Interview

Behavioral Services

- c. Note SubType = Behavioral Services
- d. Provider Interviewed = enter the name of the Provider
- e. Date Provider Interviewed = Select the date the interview occurred
- f. Description = Selection Accepted + behavior analysis service provider Name or Selection Denied + behavior analysis service provider Name
- g. Status = Complete
- h. Note = WSC indicates in the note if the consumer chose this provider.

The screenshot shows the 'iConnect' interface with a 'Notes' section. The 'Notes Details' form is displayed with the following fields:

- Division: APD
- Note By: Buck, Jennifer
- Note Date: 07/03/2023
- Program/Provider: 1 CARE LLC
- Note Type: Consumer Choice - Provider Interview
- Note Sub-Type: Behavioral Services
- Provider Interviewed: Dr Giggles
- Date Provider Interviewed: 07/06/2023
- Description: Selection Accepted - Dr. Giggles
- Note: Dr. Giggles will complete the BASP
- Status: Complete
- Date Completed: 07/03/2023

- 8. From the **File** menu, select **Save and Close Notes**.
- 9. WSC creates new provider selection record for the behavior analysis service provider the consumer chooses. From the consumer's record, select the **Provider Selection** tab. From the **File** menu, select **Add Provider**. The Provider Details page displays. Update the following fields:
 - a. Provider = select the name of the behavior analysis service provider agency
 - b. Disposition = Open
 - c. Referral Type = Behavior
 - d. Provider Worker = search for and select the name of the behavior analysis service provider



Carrie Abner
 7/3/2023 11:49 AM

Provider

File

Division *	APD	
Selected By	Buck, Jennifer	... Clear Details
Selection Date	07/03/2023	
Provider *	ABA SOLUTIONS, INC.	... Clear
Referral Type *	Behavior	
Disposition *	Open	
Disposition Date	07/03/2023	
Provider Worker *	Buck, Jennifer	... Clear Details
eMAR Date (if applicable)	07/03/2023	
Comments		

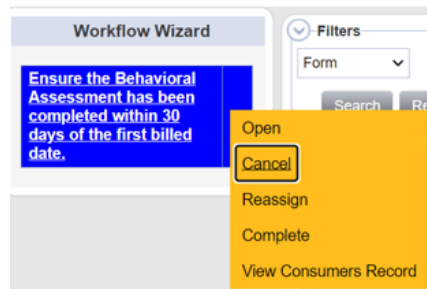
10. From the **File** menu, select **Save and Close Provider**.



Note

Each time a provider selection record is created with Referral Type = Behavior and Disposition = Open, a Workflow Wizard will trigger the tickler to “Ensure the Behavior Analysis Assessment has been completed within 30 days of the first billed date.” This tickler does not apply to this part of the workflow and should be cancelled.

From the **tickler flyout menu**, select **Cancel**.



- Once the new behavior analysis service provider agency is known, the cost plan can be updated by the WSC.
- The WSC will follow the cost plan process to add the necessary planned services, validate, and create authorizations for the assessment. If the budget is insufficient for the requested services, follow the SAN process. Part of the cost plan process includes the request for and completion of the BASE. Complete the [Service Eligibility Review Process](#) section.
- If the new behavior analysis service provider works for a different agency than the original provider, the WSC will also print a copy of the BAA and attach it to a note for the new behavior analysis service provider. From the consumer's record,

Behavioral Services

select the **Notes tab**. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:

- a. Provider/Program = the name of the WSC agency
- b. Note Type = Behavioral Services
- c. Note SubType = Behavior Analysis Assessment
- d. Note = optional
- e. Attachment = print a PDF of the BAA and attach to this note
- f. Status = Complete
- g. Recipient = behavior analysis service provider

14. From the **File** menu, select **Save and Close Notes**.

1h. BASP Completion

The WSC reviews the Behavior Analysis Assessment and having completed the cost plan or SAN process then creates the behavioral services authorization for the behavior analysis service provider who will complete the BASP. The behavior analysis service provider will complete the BASP form in APD iConnect within 90 days of the first billed date of the behavior analysis service.

Role: WSC/CDC

1. The WSC will complete the cost plan or SAN process and create the behavioral services authorization. The WSC will notify the behavior analysis service provider via a note. Navigate to the consumer's record and select the Notes tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - a. Provider/Program = the name of the WSC agency
 - b. Note Type = Behavioral Services
 - c. Note SubType = Assigned to Caseload
 - d. Description = optional – add the service that was assigned
 - e. Note = details of the caseload assignment if needed
 - f. Status = Complete
 - g. Recipient = behavior analysis service provider

Behavioral Services

APD iConnect

Carrie Abner | Notes
7/18/2023 12:23 PM

File Tools

Notes Details

Division * APD

Note By * Buck, Jennifer

Note Date * 07/18/2023

Program/Provider * 1 CARE LLC Details

Note Type * Behavioral Services

Note Sub-Type Assigned to Caseload

Description name of the service

Note

Status * Complete

Date Completed 07/18/2023

- From the **File** menu, select **Save and Close Notes**.

Role: Service Provider, Service Provider Worker

- The behavior analysis service provider receives a note that the authorization for behavioral services has been created on **My Dashboard > Notes > Complete**.

MY DASHBOARD CONSUMERS

CONSUMERS PROVIDERS

Division

Provider Selections

Notes

Notes	
Complete	5
Pending	5

Ticklers

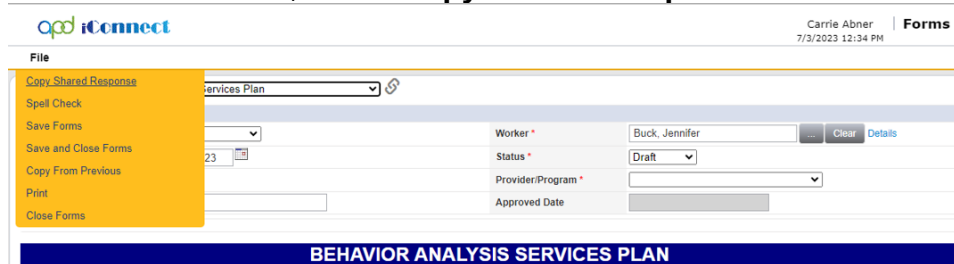
Ticklers	
Ticklers	1

- The behavior analysis service provider reviews the note as notification of the caseload assignment.
- The behavior analysis service provider will complete the BASP form in APD iConnect. Navigate to the consumers record and select the **Forms** tab. From the **File** menu, select **Add Form**. Select **"Behavior Analysis Services Plan."** The Form Details page displays. Update the following fields:
 - Review = Initial

Behavioral Services

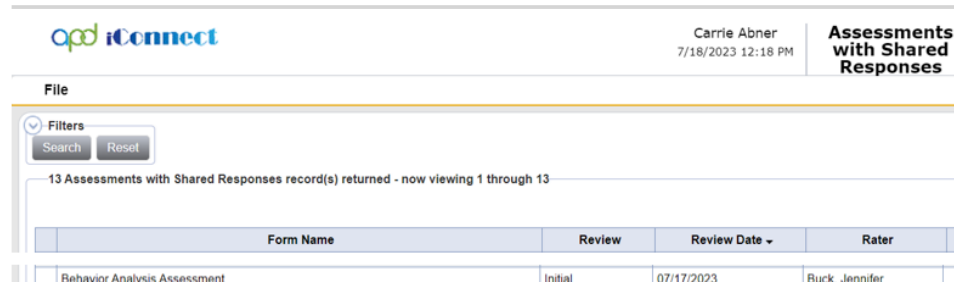
- b. Review Date = defaults to today
- c. Division = defaults to APD
- d. Worker = pre-populated with your name
- e. Status = defaults to Draft. Will change to Complete later in the workflow.
- f. Provider/Program = the name of the behavior analysis service provider's agency

4. From the **File** menu, select **Copy Shared Response**.



The screenshot shows the iConnect application interface. At the top, the 'File' menu is open, and 'Copy Shared Response' is highlighted in orange. Other menu items include 'Spell Check', 'Save Forms', 'Save and Close Forms', 'Copy From Previous', 'Print', and 'Close Forms'. The background shows the 'BEHAVIOR ANALYSIS SERVICES PLAN' form with fields for Worker (Buck, Jennifer), Status (Draft), and Provider/Program.

5. Select the most recent Behavior Analysis Assessment form from the list. This will allow pull the Maladaptive Behaviors from the Behavior Analysis Assessment form into the BASP form. The page refreshes and you are returned to the Behavior Analysis Services Plan form.



The screenshot shows the 'Assessments with Shared Responses' section of the iConnect application. It displays a table with 13 assessments. The table has columns for Form Name, Review, Review Date, and Rater. The first row shows 'Behavior Analysis Assessment' with a review status of 'Initial' and a review date of '07/17/2023' by 'Buck, Jennifer'.

Form Name	Review	Review Date	Rater
Behavior Analysis Assessment	Initial	07/17/2023	Buck, Jennifer



Note

If the behavior analysis service provider completing the BASP works for a different agency than the provider who completed the BAA, the Copy Shared Response feature cannot be used. The BAA completed by the original behavior analysis service provider will not display in the list of Assessments with Shared Responses. The Maladaptive Behavior questions will need to be answered again.

6. Complete the remaining questions in the form, saving several times along the way. It may take more than one day to complete this form.



Note

All 15 Maladaptive Behavior questions are exposed by default. After using Copy Shared Response, some may still be blank (e.g. if only 12 of the 15 behavior questions were answered, 3 will be blank.) Use the “Hide Maladaptive Behavior....” and “Hide Replacement Behavior.....” questions to hide the blank questions on the form.

Hide Maladaptive Behavior 4?	☒ Yes ☐ No
Hide Maladaptive Behavior 5?	☐ Yes ☐ No
Maladaptive Behavior 5. Target Topography:	
Maladaptive Behavior 5. Target Definition:	
Maladaptive Behavior 5. Baseline Start Date:	
Maladaptive Behavior 5. Baseline End Date:	
Maladaptive Behavior 5. Average Baseline Number:	
Maladaptive Behavior 5. Type of Measure:	

7. Graphs must also be added to the BASP form. This is done from the **Note icon** in the header of the form.

Consumer Forms	
Review *	As Needed ▼
Review Date *	07/03/2023
Division *	APD ▼
Approved By	
Note	



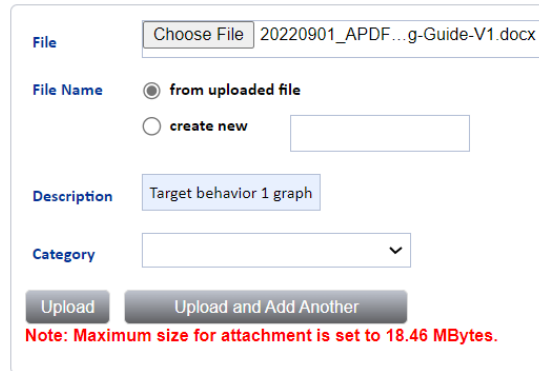
Note

The form must be saved, at least one, to display the Note icon. Save the form by selecting the **File** menu, then select **Save Form**.

8. Click the **Note icon**. The Note Details page displays. Update the following fields:
 - a. Cost Plan Review Note = No
 - b. Note Type = Behavioral Services
 - c. Note Sub Type = BASP
 - d. Description = Type of graph + time period it covers (e.g. BASP graph May – June 2023)
 - e. Notes = any additional details about the attached graphs
 - f. Status = Complete
 - g. Attachment = search for and select the document saved on your device.

Behavioral Services

- i. Description = Once the document is selected, within the attachment window, add a Description of the attachment as sometimes the file name is cryptic and not easy to identify what the attachment contains.

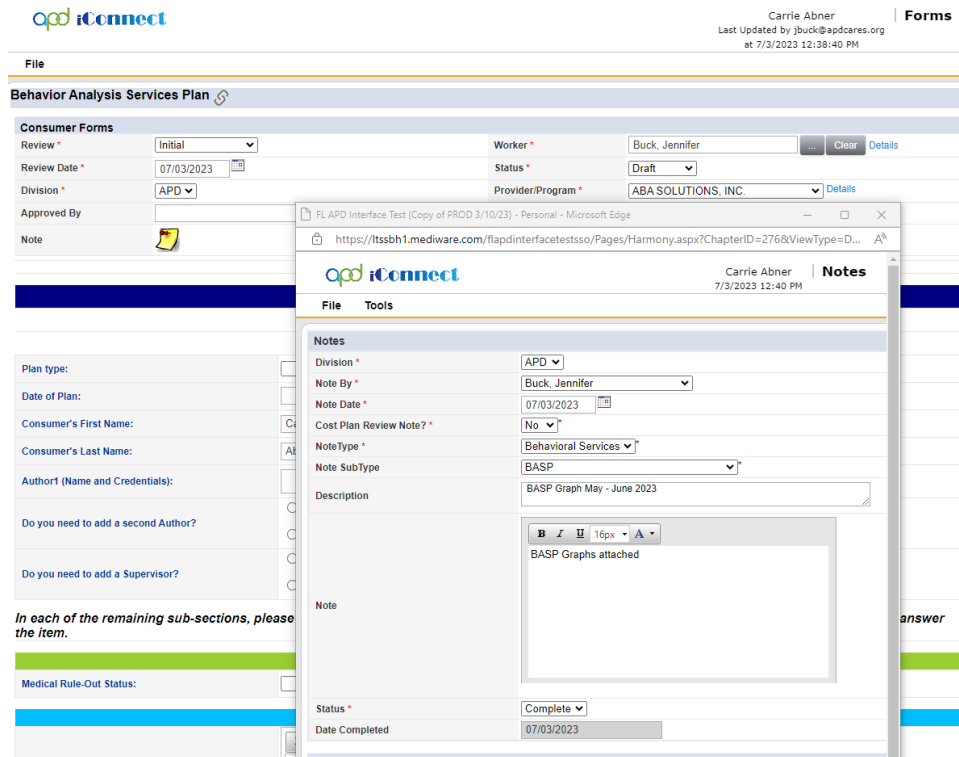


The screenshot shows a form for uploading a document. It includes a 'File' section with a 'Choose File' button and a text field containing '20220901_APDF...g-Guide-V1.docx'. Below this is a 'File Name' section with two radio buttons: 'from uploaded file' (selected) and 'create new' (with an adjacent text field). The 'Description' section has a text field with 'Target behavior 1 graph'. The 'Category' section has a dropdown menu. At the bottom are 'Upload' and 'Upload and Add Another' buttons. A red note at the bottom states: 'Note: Maximum size for attachment is set to 18.46 MBytes.'



Note

iConnect is an encrypted system and providers should not password protect documents when uploading into the system. Password protecting them results in APD not being able to open the documents and then the provider will need to be contacted and asked to resubmit the documentation.



The screenshot shows the iConnect 'Behavior Analysis Services Plan' form. The 'Consumer Forms' section includes fields for 'Review' (Initial), 'Review Date' (07/03/2023), 'Division' (APD), 'Worker' (Buck, Jennifer), 'Status' (Draft), and 'Provider/Program' (ABA SOLUTIONS, INC.). A 'Notes' pop-up window is open, showing a form for adding a note. The note form includes fields for 'Division' (APD), 'Note By' (Buck, Jennifer), 'Note Date' (07/03/2023), 'Cost Plan Review Note?' (No), 'Note Type' (Behavioral Services), 'Note SubType' (BASP), and 'Description' (BASP Graph May - June 2023). The note is marked as 'Complete' and 'Date Completed' is 07/03/2023.

9. From the **File** menu, select **Save and Close Notes**.

10. The page refreshes and you're returned to the BASP form.

11. Once all questions are answered and graphs attached as a Note, change the status of the form to Complete.
12. From the **File** menu, select **Save and Close Form**. The behavior analysis service provider must complete the BASP within 90 days of the first billed date.



Note

The behavior analysis service providers can begin services in the BASP 5 days before the BASP form is completed. If they begin services but do not complete the BASP form after 5 days, the QA process will be pursued.

1i. Monitoring Completion by WSC

The WSC will use workflow wizards to verify the BASP form is completed within 90 days of the first billed date.

Role: WSC/CDC

1. When the behavior analysis service provider saved the Behavior Analysis Assessment form as complete, a Workflow Wizard triggered a tickler to the WSC to “Ensure the BASP has been completed within 90 days of the first billed date.”
2. The WSC will monitor **My Dashboard > Ticklers** for new ticklers.

The screenshot shows a web application interface with a top navigation bar containing 'MY DASHBOARD' (highlighted) and 'CONSUMERS'. Below this, there are two main sections: 'CONSUMERS' and 'PROVIDERS'. The 'CONSUMERS' section contains four dropdown menus: 'Division', 'Provider Selections', 'Notes', and 'Ticklers'. The 'PROVIDERS' section contains one dropdown menu: 'Ticklers'. At the bottom of the 'CONSUMERS' section, there is a 'Ticklers' list with a count of 36.

APD iConnect Welcome, Jennifer Buck | Ticklers
7/18/2023 8:19 PM

File

Filters

Status Equal To New AND X

iConnect ID +

☐ Apply Alert Days Before Due

Search Reset

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Abner, Carrie	59217	Ensure the BASP is completed within 90 days of the first billed date	07/17/2023	11/14/2023		New	Buck, Jennifer

Completed Within 90 Days

- If the BASP was completed within 90 days of the first billed date, the “Ensure the BASP has been completed within 90 days of the first billed date” tickler can be marked as complete. Ticklers are marked as complete by selecting the **tickler flyout menu** then select **Complete**.



- Proceed to the [LRC Preliminary Review section](#).

Not Completed Within 90 Days

- If the BASP has not been completed within 90 days of the first billed date, the WSC will review and assess the reasons why with the behavior analysis service provider outside of APD iConnect and document in a note, notifying the region behavioral staff and agency owner. One of four scenarios can occur:
 - The behavior analysis service provider will complete the BASP late. WSC will indicate the reason why it was completed late in the note for the region behavior analyst (Region Clinical Workstream Worker) and agency owner.
 - The behavior analysis service provider cannot complete the BAA. WSC will complete the provider selection process again with the consumer and notify the region behavior analyst (Region Clinical Workstream Worker) and agency owner via a note.
 - Client refused the service. The WSC will follow up with the consumer and indicate the reason services were refused in the note for the region behavior

Behavioral Services

analyst (Region Clinical Workstream Worker) and agency owner. The WSC may complete the provider selection process again with the consumer depending on the situation.

4. The behavior analysis service provider is not responsive. The WSC will notify the region behavior analyst (Region Clinical Workstream Worker) and QA Workstream Worker who will assess if a plan of remediation is needed. Concurrently, the WSC will complete the provider selection process again with the consumer.
- b. To create the note, from the consumer's record, select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - a. Note Type = Behavioral Services
 - b. Note SubType = Assessment Request
If the provider is not responsive, use the Quality Assurance Note SubType
 - c. Description = BASP Not Completed
 - d. Status = Complete
 - e. Note = reason why it was not completed in 30 days
 - f. Recipient = Regional behavioral staff and agency owner
- c. From the **File** menu, select **Save and Close Notes**.

Behavioral Services

Carrie Abner | **Notes**
7/21/2023 9:36 AM

FileTools

Notes Details

Division *	APD ▾
Note By *	Buck, Jennifer ▾
Note Date *	07/21/2023 
Program/Provider *	1 CARE LLC ▾ Details
Note Type *	Behavioral Services ▾*
Note Sub-Type	Assessment Request ▾*
Description	BASP Not Completed 
Note	B I U 16px A ▾ Reason why BASP wasn't completed within 90 days
Status *	Complete ▾
Date Completed	07/21/2023

Carrie Abner | **Notes**
7/21/2023 9:36 AM

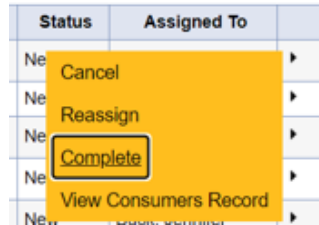
FileTools

Notes Details

Division *	APD ▾
Note By *	Buck, Jennifer ▾
Note Date *	07/21/2023 
Program/Provider *	1 CARE LLC ▾ Details
Note Type *	Behavioral Services ▾*
Note Sub-Type	Quality Assurance ▾*
Description	BASP Not Completed 
Note	B I U 10pt A ▾ Provider not responsive
Status *	Complete ▾
Date Completed	07/21/2023

- d. Once the WSC has completed his/her follow-up the “Ensure the BASP has been completed within 90 days of

the first billed date” tickler can be marked as complete. Ticklers are marked as complete by selecting the **tickler flyout menu** then select **Complete**.



- e. If the behavior analysis service provider will complete the BASP late, proceed to the [BASP Completion section](#).
- f. If the behavior analysis service provider cannot complete the BASP, proceed to the [Behavior Analysis Service Provider Selection Process section](#).
- g. If the client refused the service and a new provider will be selected, proceed to the [Behavior Analysis Service Provider Selection Process section](#).
- h. If the behavior analysis service provider is not responsive, proceed to the [Behavior Analysis Service Provider Selection Process section](#).

1j. LRC Preliminary Review

Once the BASP form is completed, the behavior analysis service provider submits the BASP for LRC review via a note in APD iConnect. The LRC Chair or designee completes the preliminary review and updates the same note with the findings as notification back to the behavior analysis service provider.

In addition, a LRC Case Review can be requested at any time. In these cases, a note will still be submitted to the LRC Chair or designee, but it will use a different Note Sub Type than a LRC Case Review requested from a BASP submission.

Role: Service Provider, Service Provider Worker

1. Once the BASP form is completed, the behavior analysis service provider will add a note for the LRC Chair or designee notifying them of the BASP submission. Navigate to the consumers record and select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - a. Program/Provider = select the name of the behavior analysis service provider's agency
 - b. Note Type = LRC Review
 - c. Note Sub Type = BASP Submission
 - d. Description = optional

Behavioral Services

- e. Note = any special request with the submission request (e.g. month or time of day for the review)
- f. Status = Pending
- g. Attachments = add if applicable
- h. Recipient = LRC Chair.

APD iConnect

Carrie Abner | Notes
7/3/2023 12:47 PM

File Tools

Notes Details

Division * APD

Note By * Buck, Jennifer

Note Date * 07/03/2023

Program/Provider * ABA SOLUTIONS, INC. Details

Note Type * LRC Review

Note Sub-Type * BASP Submission

Description

Note

BASP submitted for LRC Chair review

Status * Pending

Date Completed

Attachments

Add Attachment

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	7/3/2023		Unread		Remove

2. From the **File** menu, select **Save and Close Notes**.
3. If a LRC Case Review is needed outside of the BASP submission process, it will be requested through a note. Navigate to the consumers record and select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - a. Program/Provider = enter the name of the behavior analysis service provider's agency
 - b. Note Type = LRC Review
 - c. Note Sub Type = LRC Review Requested
 - d. Status = Complete
 - e. Attachments = add if applicable
 - f. Recipient = LRC Chair

Behavioral Services

opd iConnect Carrie Abner | **Notes**
7/3/2023 12:52 PM

File Tools

Notes Details

Division *

Note By *

Note Date *

Program/Provider * [Details](#)

Note Type *

Note Sub-Type *

Description

Note

B I U 16px **A**

requesting LRC Review

Status *

Date Completed

Attachments

[Add Attachment](#)

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	7/3/2023		Unread		Remove

4. From the **File** menu, select **Save and Close Notes**.

Role: Region Clinical Workstream Worker

5. The LRC Chair monitors **My Dashboard > Consumers > Notes > Pending** for incoming notes.

MY DASHBOARD CONSUMERS PROVIDERS CLAIMS SCHEDULE

CONSUMERS

Division

My Enrollments

Provider Selections

Notes

Complete	7
Pending	4

PROVIDERS

Ticklers

Behavioral Services

6. The LRC Chair reviews the note as notification the BASP has been submitted. The LRC Chair or designee completes the preliminary review within 21 days by reviewing the completed BASP form in APD iConnect.

APD iConnect

Welcome, Jennifer Buck | Notes
7/3/2023 12:56 PM

File Tools

Filters

Status Equal To Pending AND X

iConnect ID +

Search Reset

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

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Description	Author	Status	
59217	Abner, Carrie	LRC Review	BASP Submission	07/03/2023		Buck, Jennifer	Pending	

7. The LRC Chair will determine if the BASP criteria has been met. There are 2 possible outcomes:
 - a. [BASP Criteria Met](#)
 - b. [BASP Criteria Not Met](#)

1ji. BASP Criteria Met

Role: Region Clinical Workstream Worker

1. If the BASP criteria has been met the LRC Chair or designee will document in the **existing LRC Review > BASP Submission note**. With the note already open from the previous section, update the following fields:
 - a. Note Type = LRC Review
 - b. Note Sub Type = Update to BASP Received
 - c. Note = enter details about the received BASP if needed
 - d. Status = Complete
 - e. Recipient = behavior analysis service provider

Behavioral Services

The screenshot displays the iConnect Notes application interface. At the top, the iConnect logo is on the left, and the user's name 'Carrie Abner' and last update information 'Last Updated by j.buck@apdcares.org at 7/3/2023 12:56:09 PM' are on the right. Below the header, there are 'File' and 'Tools' menus. The 'Notes' tab is selected, showing a 'Notes Details' form. The form includes fields for 'Division' (APD), 'Note By' (Buck, Jennifer), 'Note Date' (07/03/2023), 'Program/Provider' (ABA SOLUTIONS, INC.), 'Note Type' (LRC Review), and 'Note Sub-Type' (BASP Received). A 'Description' field contains the text: 'On 7/3/2023 at 12:56 PM, Jennifer Buck wrote: BASP submitted - ready for LRC Review'. Below this, a 'New Text' editor is open with the text 'BASP Received by LRC Chair'. The 'Status' is set to 'Complete' and the 'Date Completed' is 07/03/2023. At the bottom, there are sections for 'Attachments' (with an 'Add Attachment' link) and 'Note Recipients' (with an 'Add Note Recipient' field and a 'Clear' button).

Notes

File Tools

Notes Details

Division * APD

Note By * Buck, Jennifer

Note Date * 07/03/2023

Program/Provider ABA SOLUTIONS, INC. Details

Note Type * LRC Review

Note Sub-Type * BASP Received

Description

On 7/3/2023 at 12:56 PM, Jennifer Buck wrote:
BASP submitted - ready for LRC Review

Note

New Text

B I U 16px A

BASP Received by LRC Chair

Append Text to Note

Status * Complete

Date Completed 07/03/2023

Attachments

Add Attachment

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient: ... Clear

2. From the **File** menu, select **Save and Close Notes**.
3. Outside of iConnect, the LRC Chair will be using the notes in iConnect to prepare the LRC agenda.

Role: Service Provider, Service Provider Worker

4. The behavior analysis service provider monitors **My Dashboard > Consumers > Notes > Complete** for incoming notes as notification the BASP was received and met criteria. The behavior analysis service provider will be on the lookout for a second note with the date of the [LRC Meeting](#).

Behavioral Services

MY DASHBOARD CONSUMERS PROVIDERS CLAIMS

CONSUMERS PROVIDERS

Division Ticklers

Notes

Complete 7

Pending 3

Provider Selections

opd iConnect

Welcome, Jennifer Buck | Notes

7/3/2023 1:00 PM

File Tools

Filters

Status Equal To Complete AND

iConnect ID

Search Reset

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

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status	
59217	Abner, Carrie	Behavioral Services	Behavioral Assessment	07/03/2023	optional	Buck, Jennifer	Complete	☐
59217	Abner, Carrie	LRC Review	LRC Review Requested	07/03/2023		Buck, Jennifer	Complete	☐
59217	Abner, Carrie	LRC Review	BASP Received	07/03/2023		Buck, Jennifer	Complete	☐

1jii. BASP Criteria Not Met

Role: Region Clinical Workstream Worker

- If the BASP criteria has NOT been met the LRC Chair will reverse the status of the BASP so the behavior analysis service provider can make updates. From the **File** menu, select **Reverse Status**. The status of the form changes from Complete to Pending.

opd iConnect

Carrie Abner

Last updated by jibuck@apdcares.org

at 7/3/2023 1:05:25 PM

Forms

File

History

Duplicate Assessment

Reverse Status

Print

Close Forms

Revision

Approved By

Note

Worker

Status

Provider/Program

Approved Date

BEHAVIOR ANALYSIS SERVICES PLAN

Plan type:

Date of Plan:

- The LRC Chair will notify the provider via the **existing LRC Review > BASP Submission note**. With the note already open from the previous section, update the following fields:
 - Note Type = LRC Review
 - Note Sub Type = Update to BASP Received – Revisions
 - Description = Revisions Requested
 - Note = list details of what is needed
 - Status = Complete. The behavior analysis service provider will respond with a new note.

Behavioral Services

- f. Recipient = behavior analysis service provider. If the behavior analysis service provider has already marked the note as read, he/she will need to be re-added, even though the name is listed as recipient already.

The screenshot displays the iConnect system interface. At the top, the logo 'iConnect' is visible on the left, and user information 'Carrie Abner' and 'Last Updated by jibuck@apdcares.org at 7/3/2023 1:01:41 PM' are on the right. Below the header, there are 'File' and 'Tools' tabs. The main form area contains fields for 'Division' (APD), 'Note By' (Buck, Jennifer), 'Note Date' (07/03/2023), 'Program/Provider' (ABA SOLUTIONS, INC.), 'Note Type' (LRC Review), and 'Note Sub-Type' (BASP Received - Revisions). The 'Description' field contains the text 'Revisions Requested'. Below this, a 'Note' section shows a timestamped entry: 'On 7/3/2023 at 12:56 PM, Jennifer Buck wrote: BASP submitted - ready for LRC Review'. A 'New Text' editor is open, showing a list of revisions to be made. The 'Status' is set to 'Complete' and 'Date Completed' is 07/03/2023. Below the form, there is an 'Attachments' section with a table header (Document, Description, Category, Action) and a message 'There are no attachments to display'. At the bottom, there is a 'Note Recipients' section with a table header (Name, Date Sent, Date Read, Status, Date Signed, Remove) and one recipient listed: Buck, Jennifer, with Date Sent 07/03/2023 and Status Unread.

File Tools

Division * APD

Note By * Buck, Jennifer

Note Date * 07/03/2023

Program/Provider ABA SOLUTIONS, INC. Details

Note Type * LRC Review

Note Sub-Type * BASP Received - Revisions

Description Revisions Requested

Note

On 7/3/2023 at 12:56 PM, Jennifer Buck wrote:
BASP submitted - ready for LRC Review

New Text

Please make the following revisions:

- 1.
- 2.
- 3.

Append Text to Note

Status * Complete

Date Completed 07/03/2023

Attachments

Add Attachment

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	Remove
Buck, Jennifer	07/03/2023		Unread		Remove

3. From the **File** menu, select **Save and Close Notes**.

Role: Service Provider, Service Provider Worker

4. The behavior analysis service provider monitors **My Dashboard > Consumers > Notes > Complete** for incoming notes.
5. The behavior analysis service provider reviews the **LRC Review > BASP Received – Revisions** note for reasons why the BASP criteria was not met.

APD iConnect

Welcome, Jennifer Buck | Notes
7/3/2023 1:03 PM

File Tools

Filters

Status Equal To Complete AND

iConnect ID +

Search Reset

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

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status	
59217	Abner, Carrie	Behavioral Services	Behavioral Assessment	07/03/2023	optional	Buck, Jennifer	Complete	☐
59217	Abner, Carrie	LRC Review	LRC Review Requested	07/03/2023		Buck, Jennifer	Complete	☐
59217	Abner, Carrie	LRC Review	BASP Received - Revisions	07/03/2023	Revisions Requested	Buck, Jennifer	Complete	☐

- The behavior analysis service provider will update the BASP and resubmit it via a new note. Navigate to the consumer's record and select the **Forms** tab.
- Select the pending **Behavior Analysis Services Plan** form from the list.
- Update the form per the requested changes in the **LRC Review > BASP Received > Revisions Requested** note.
- Once updates to the BASP form are complete, change the status to **Complete**. From the **File** menu, select **Save and Close Form**.
- The behavior analysis service provider will submit a new note to the LRC Chair that the updated BASP has been submitted. Repeat the steps in the [LRC Preliminary Review](#) section.

1k. LRC Meeting

The LRC Meeting is held after the BASP is submitted and criteria is met. A LRC BASP Review can also be completed at any time, upon request per the LRC Case Review > LRC Review Requested note discussed in the previous section.

After receiving the BASP Submitted or LRC Review Requested noted, the LRC Chair or designee determines whether there will be a desk review or a review at a LRC meeting and notifies requesting party/behavior analysis service provider using a note. The review is completed, and recommendations are documented on the LRC Case Review and Approval form. The LRC Member Review of BASP form is also completed as part of the review. The completion of the review is communicated back to the behavior analysis service provider via a note in APD iConnect. The financial eligibility review is also completed before the LRC Meeting. Complete the [Service Eligibility Review Process](#) section.

Role: Regional Clinical Workstream Worker

Behavioral Services

1. If the LRC meeting is needed, the LRC Chair has 30 days from the initial receipt of the BASP to notify the behavior analysis service provider of the meeting date. This is done by a note in APD iConnect. Navigate to the consumers record and select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - a. Note Type = LRC Review
 - b. Note Sub Type = Review Scheduled
 - c. Description = Date Scheduled mm/dd/yy
 - d. Note = add additional details as needed
 - e. Status = Complete
 - f. Recipient = behavior analysis service provider

APD iConnect

Carrie Abner | Notes
7/3/2023 1:12 PM

File Tools

Notes Details

Division * APD

Note By * Buck, Jennifer

Note Date * 07/03/2023

Program/Provider

Note Type * LRC Review

Note Sub-Type Review Scheduled

Description Date scheduled mm/dd/yy

Note

Status * Complete

Date Completed 07/03/2023

Attachments

Add Attachment

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	7/3/2023		Unread		Remove

2. From the **File** menu, select **Save and Close Notes**.
3. If a review during the LRC meeting is not required and a desk review will suffice, the LRC Chair or designee doesn't need to send a note to the behavior analysis service provider, but he/she does have to complete the **LRC Member Review of BASP** form and the **LRC Case Review and Approval** form.

Behavioral Services

4. The LRC Chair or designee begins the LRC Member Review of BASP form in APD iConnect. Navigate to the consumers record and select the **Forms** tab. From the **File** menu, select **Add Form**. Select **“LRC Member Review of BASP.”** The Form Details page displays. Update the following fields:
 - a. Review = select As Needed
 - b. Review Date = defaults to today
 - c. Division = defaults to APD
 - d. Worker = pre-populated with your name
 - e. Provider/Program = leave blank
 - f. Status = Draft. This will be updated to Complete later in the workflow after the LRC meeting or desk review is completed.

APD iConnect

Carrie Abner
7/3/2023 1:14 PM

Forms

File

Please Select Type: **LRC Member Review of BASP**

Consumer Forms

Review * **As Needed** Worker * Buck, Jennifer **Clear** **Details**

Review Date * 07/03/2023 Status * **Draft**

Division * **APD** Provider/Program

Approved By Approved Date

LRC Member Review of BASP

Date of Review 07/03/2023

Presenter's Name Jennifer Buck

Document Date 07/04/2023

Approval Status

Select Approval Status*

☐ Approved: if all below are met (Yes)

☐ Approved with Modifications: if all below are met, but needs modification

☐ Not Approved: if any below are not met (No)

Review Criteria

1. Identifying information for the individual affected by the plan (including name, age, home name, support coordinator, authors and supervisor names with credentials, support plan effective date). Includes title of the document and version date. **Yes**

1. Comments comments about #1 3963 characters remaining

2. Operational definitions of behavior targets for reduction and acquisition or as a replacement. **Yes**

2. Comments comments about #2 3963 characters remaining

5. Complete the questions in the form. The Approval Status section will be added later in the workflow, after the LRC meeting or desk review is complete.
6. From the **File** menu, select **Save and Close Form**.
7. The LRC Chair or designee also begins the LRC Case Review and Approval form in APD iConnect. Navigate to the consumers record and select the **Forms** tab. From the **File** menu, select

Add Form. Select “**LRC Case Review and Approval.**” The Form Details page displays. Update the following fields:

- Review = select As Needed
- Review Date = defaults to today
- Division = defaults to APD
- Worker = pre-populated with your name
- Provider/Program = leave blank
- Status = Draft. This will be updated to Complete later in the workflow after the LRC Review meeting or desk review is completed.

The screenshot shows the 'iConnect' interface for the 'LRC Case Review and Approval' form. At the top, there's a 'File' menu and a user profile for 'Carrie Abner' with the date '7/3/2023 1:16 PM'. The form is titled 'LRC Case Review and Approval (Attachment Q)'. It is divided into three main sections: 'Consumer Forms', 'Method or Type of Review', and 'Decision'. The 'Consumer Forms' section includes fields for 'Review' (set to 'Initial'), 'Review Date' (07/03/2023), 'Division' (APD), 'Worker' (Buck, Jennifer), 'Status' (Draft), and 'Provider/Program'. The 'Method or Type of Review' section has a 'Review Type' dropdown menu with options like 'Annual Update/Re-Approval', 'Revised Full BASP', 'Data Review', 'Behavior Assistant Request', 'Safety Plan', and 'Other'. It also has a 'Type of Review' dropdown set to 'In-Person LRC Presentation'. The 'Decision' section includes a 'BASP Approved / Action' dropdown, a 'Recommended Review Period' dropdown, and a 'Next Review Specific Date' field.

- Complete the questions in the form. The BASP Approved/Action question will be added later in the workflow, after the LRC meeting or desk review is complete.
- From the **File** menu, select **Save and Close Form**.
- The LRC meeting is held or the desk review is completed. A decision will be rendered within 90 days of the initial receipt of the BASP. There are 3 possible outcomes:
 - [Approved](#)
 - [Approved with Modifications](#)
 - [Not Approved](#)

1ki. Approved

The LRC Chair or designee will update the **LRC Member Review of BASP** form and the **LRC Case Review and Approval Form** then notify the behavior analysis service provider via a note in APD iConnect.

Role: Regional Clinical Workstream Worker

- The LRC Chair or designee will update the LRC Member Review of BASP form in APD iConnect. Navigate to the consumers record and select the **Forms** tab. From the list view, select the **LRC Member Review of BASP** form. The Form Details page displays. Update the following fields:
 - Approval Status = Approved
 - Status = Complete

Carrie Abner
Last Updated by jrbuck@apdcares.org
at 7/3/2023 1:16:28 PM

File Reports

LRC Member Review of BASP

Consumer Forms

Review * As Needed Worker * Buck, Jennifer Clear Details

Review Date * 07/03/2023 Status * Complete

Division * APD Provider/Program

Approved By Buck, Jennifer Approved Date 07/03/2023

Note

LRC Member Review of BASP

Date of Review 07/03/2023

Presenter's Name Jennifer Buck

Document Date 07/04/2023

Approval Status

Select Approval Status*

☒ Approved: if all below are met (Yes)

☐ Approved with Modifications: if all below are met, but needs modification

☐ Not Approved: if any below are not met (No)

- From the **File** menu, select **Save and Close Form**.
- The LRC Chair will also update the LRC Case Review and Approval form. Navigate to the consumers record and select the **Forms** tab. From the list view, select the **LRC Case Review and Approval** form. The Form Details page displays. Update the following fields:
 - Decision section > BASP Approved/Action = Yes
 - Status = Complete

Behavioral Services

LRC Case Review and Approval (Attachment Q)	
Review Date:	07/03/2023
Consumer Name:*	Carrie Abner
Support Coordinator:	
Presenter:	Jennifer Buck 87 characters remaining
Lead Reviewer:	70 characters remaining
Location of Services:	70 characters remaining
Method or Type of Review	
Review Type:	Annual Update/Re-Approval Revised Full BASP Data Review Behavior Assistant Request Safety Plan Other
Type of Review:	In-Person LRC Presentation
Decision	
BASP Approved / Action:	Yes
Recommended Review Period:	12 Month
Next Review Specific Date:	07/05/2024
Date of BASP Presented:	06/30/2023
Number of Months BASP is approved for from the date of this LRC Review:	12

4. From the **File** menu, select **Save and Close Forms**.
5. The LRC Chair notifies the behavior analysis service provider of the BASP approval via a note in APD iConnect. Navigate to the consumers record and select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - a. Note Type = LRC Review
 - b. Note Subtype = Decision – Approved
 - c. Status = Complete
 - d. Recipient = behavior analysis service provider & WSC

Behavioral Services

Notes Details

Division *

Note By *

Note Date *

Program/Provider

Note Type *

Note Sub-Type

Description

Status *

Date Completed

Attachments

[Add Attachment](#)

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	7/3/2023		Unread		Remove

6. From the **File** menu, select **Save and Close Notes**

Role: Service Provider, Service Provider Worker

7. The behavior analysis service provider monitors **My Dashboard > Consumers > Notes > Complete** for notification of the BASP approval and services may begin or continue. The behavior analysis service provider will select the LRC Review > Decision – Approval note from the list view and review the details added in the notes section. In addition, the behavior analysis service provider can review the completed LRC Member Review of BASP and LRC Case Review and Approval form. The forms are read only for the behavior analysis service provider.

MY DASHBOARD **CONSUMERS** **PROVIDERS** **CLAIMS**

CONSUMERS

Division	Notes	
Complete	9	
Pending	3	

PROVIDERS

Ticklers	Provider Selections

Behavioral Services

APD iConnect

Welcome, Jennifer Buck | Notes
7/3/2023 1:26 PM

File Tools

Filters

Status Equal To Complete AND

Search Reset

10 Notes record(s) returned - now viewing 1 through 10

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
59217	Abner, Carrie	Behavioral Services	Behavioral Assessment	07/03/2023	optional	Buck, Jennifer	Complete
59217	Abner, Carrie	LRC Review	LRC Review Requested	07/03/2023		Buck, Jennifer	Complete
59217	Abner, Carrie	LRC Review	BASP Received - Revisions	07/03/2023	Revisions Requested	Buck, Jennifer	Complete
59217	Abner, Carrie	LRC Review	Review Scheduled	07/03/2023	Date scheduled mm/dd/yy	Buck, Jennifer	Complete
59217	Abner, Carrie	LRC Review	Decision - Approved	07/03/2023		Buck, Jennifer	Complete

Role: WSC/CDC

8. The WSC monitors **My Dashboard > Consumers > Notes** for notification of the BASP approval. The WSC may need to create more/update authorizations according to the current cost plan processes.

1kii. Approved with Modifications

The LRC Chair will update the LRC Member Review of BASP form and the LRC Case Review and Approval Form then notify the behavior analysis service provider via a note in APD iConnect. The behavior analysis service provider will update the BASP and resubmit.

Role: Regional Clinical Workstream Worker

1. The LRC Chair or designee will update the LRC Member Review of BASP form in APD iConnect. Navigate to the consumers record and select the **Forms** tab. From the list view, select the **LRC Member Review of BASP** form. The Form Details page displays. Update the following fields:
 - a. Approval Status = Approved with Modifications
 - b. Status = Pending

Behavioral Services

apd iConnect Carrie Abner
Last Updated by jrbuck@apdcares.org
at 7/3/2023 1:28:42 PM **Forms**

File Reports

LRC Member Review of BASP

Consumer Forms

Review * As Needed Worker * Buck, Jennifer Clear Details

Review Date * 07/03/2023 Status * Pending

Division * APD Provider/Program

Approved By Approved Date

Note

LRC Member Review of BASP

Date of Review 07/03/2023

Presenter's Name Jennifer Buck

Document Date 07/04/2023

Approval Status

Select Approval Status*

☐ Approved: if all below are met (Yes)

☒ Approved with Modifications: if all below are met, but needs modification

☐ Not Approved: if any below are not met (No)

- From the **File** menu, select **Save and Close Form**.



Note

The LRC Chair or designee can use the Pending status to create a queue on **My Dashboard > Pending Assessments Queue** of BASP's that are approved with modifications and awaiting resubmission from the behavior analysis service provider. If Provider never resubmits, use this same queue to identify forms that need to be marked as complete.

apd iConnect Welcome, Jennifer Buck
7/3/2023 1:35 PM **Pending Assessments Queue**

File

MY DASHBOARD CONSUMERS PROVIDERS CLAIMS SCHEDULER REPORTS

CONSUMERS **PROVIDERS** **TASKS**

Division Ticklers Links

My Enrollments

Provider Selections

Notes

My Management

Current Active Cases

Enrollments

SAN Queue

Pending Assessments Queue

Filters

Assessment Begins With LRC Member Review of BASP AND

Consumer Name +

Search Reset

1 Pending Assessments Queue record(s) returned - now viewing 1 through 1

Consumer Name	Case No	Assessment	Review Date	Rater	Status	
Abner, Carrie	59217	LRC Member Review of BASP	07/03/2023	Buck, Jennifer	Pending	☐

First Previous Records per page 15 Next Last

- The LRC Chair will also update the LRC Case Review and Approval form. Navigate to the consumers record and select the **Forms** tab. From the list view, select the **LRC Case Review and Approval** form. The Form Details page displays. Update the following fields:

Behavioral Services

- Decision section > Approved/Action = With Modifications
- Status = Pending

LRC Case Review and Approval (Attachment Q)

Review Date:	07/03/2023
Consumer Name:	Carrie Abner
Support Coordinator:	
Presenter:	Jennifer Buck
Lead Reviewer:	
Location of Services:	

Method or Type of Review

Review Type:	Annual Update/Re-Approval Revised Full BASP Data Review Behavior Assistant Request Safety Plan Other New BASP
Type of Review:	In-Person LRC Presentation

Decision

BASP Approved / Action:	With Modifications (See "Approval Contingent I")
Recommended Review Period:	12 Month
Next Review Specific Date:	07/05/2024
Date of BASP Presented:	06/30/2023
Number of Months BASP is approved for from the date of this LRC Review:	12

- From the **File** menu, select **Save and Close Forms**.



Note

The LRC Chair or designee can use the Pending status to create a queue on **My Dashboard > Pending Assessments Queue** of BASP's that are approved with modifications and awaiting resubmission from the behavior analysis service provider. If Provider never resubmits, use this same queue to identify forms that need to be marked as complete.

MY DASHBOARD
CONSUMERS
PROVIDERS
CLAIMS
SCHEDULER
REPORTS

CONSUMERS

Division

My Enrollments

Provider Selections

Notes

PROVIDERS

Ticklers

TASKS

Links

My Management

Current Active Cases

Enrollments

SAN Queue

Pending Assessments Queue

Welcome, Jennifer Buck
7/3/2023 1:36 PM

Pending Assessments Queue

File

Filters

Assessment

Begins With

LRC Case Review and Approval

AND

X

Consumer Name

+

Search

Reset

1 Pending Assessments Queue record(s) returned - now viewing 1 through 1

Consumer Name	Case No	Assessment	Review Date	Rater	Status	
Abner, Carrie	59217	LRC Case Review and Approval	07/03/2023	Buck, Jennifer	Pending	☐

First

Previous

Records per page 15

Next

Last

Behavioral Services

- The LRC Chair will reverse the status of the BASP so the behavior analysis service provider can make updates. From the **File** menu, select **Reverse Status**. The status of the form changes from Complete to Pending.

The screenshot shows the iConnect interface. At the top right, it says 'Carrie Abner' and 'Last Updated by jibuck@asodc.com at 7/3/2023 1:05:25 PM'. There is a 'Forms' button. On the left, a 'File' menu is open, highlighting 'Reverse Status'. The main area shows a 'BEHAVIOR ANALYSIS SERVICES PLAN' form. Fields include 'Worker' (Buck, Jennifer), 'Status' (Complete), 'Provider/Program' (ABA SOLUTIONS, INC.), 'Approved By' (Buck, Jennifer), and 'Approved Date' (07/03/2023). Below the form, there are fields for 'Plan type' (New BASP) and 'Date of Plan' (07/03/2023).

- The LRC Chair notifies the behavior analysis service provider of the BASP approval with modifications via a note in APD iConnect. Navigate to the consumers record and select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - Note Type = LRC Review
 - Note Subtype = Decision – Approved with Modifications
 - Status = Complete
 - Recipient = behavior analysis service provider & WSC

The screenshot shows the iConnect interface with the 'Notes' tab selected. The 'Notes Details' form is displayed. Fields include 'Division' (APD), 'Note By' (Buck, Jennifer), 'Note Date' (07/03/2023), 'Program/Provider' (ABA SOLUTIONS, INC.), 'Note Type' (LRC Review), 'Note Sub-Type' (Decision - Approved with Modification), 'Description' (notifying behavioral provider and WSC the BASP was approved with modifications), 'Status' (Complete), and 'Date Completed' (07/03/2023). Below the form, there is an 'Attachments' section with a table showing no attachments. At the bottom, there is a 'Note Recipients' section with a table showing one recipient: Buck, Jennifer.

Document	Description	Category	Action
There are no attachments to display			

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	7/3/2023		Unread		Remove

7. From the **File** menu, select **Save and Close Notes**.
8. The behavior analysis service provider has 30 days to resubmit.

Role: WSC/CDC

9. The WSC monitors **My Dashboard > Consumers > Notes > Complete** for notification of the BASP approval with modifications. This note serves as notification only. The WSC will not proceed with creating more/updating authorizations until the BASP is fully approved.

The screenshot shows a web application interface with a top navigation bar containing 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', and 'CLAIMS'. Below this, there are two main sections: 'CONSUMERS' and 'PROVIDERS'. The 'CONSUMERS' section has a 'Division' dropdown menu and a 'Notes' table. The 'Notes' table has two rows: 'Complete' with a count of 10, and 'Pending' with a count of 3. The 'PROVIDERS' section has a 'Ticklers' dropdown menu and a 'Provider Selections' dropdown menu.

CONSUMERS		PROVIDERS	
Division		Ticklers	
Notes		Provider Selections	
Complete	10		
Pending	3		

Role: Service Provider, Service Provider Worker

10. The behavior analysis service provider monitors **My Dashboard > Consumers > Notes > Complete** for notification of the BASP approval with modifications. The behavior analysis service provider will select the LRC Review > Decision – Approved with Modifications note from the list view and review the modifications that are needed in the notes section. In addition, the behavior analysis service provider can review the LRC Member Review of BASP and LRC Case Review and Approval form. The forms are read only for the behavior analysis service provider.
11. The behavior analysis service provider will update the Behavioral Analysis Service Plan (BASP) form in APD iConnect. Navigate to the consumers record and select the **Forms** tab. From the forms list view, select the **Behavioral Analysis Service Plan (BASP)** form that is in Pending status. Update the following fields:
 - a. Per instruction in the LRC Review > Decision – Approved with Modifications note, update the form to reflect all required modifications identified in the note.
 - b. Status = Complete
12. From the **File** menu, select **Save and Close Form**.

Behavioral Services



Carrie Abner | **Forms**
7/21/2023 10:15 AM

File

Please Select Type: Behavior Analysis Services Plan (BASP) 

Consumer Forms

Review *	Initial 	Worker *	Buck, Jennifer 	 Clear Details
Review Date *	07/21/2023 	Status *	Draft 	
Division *	APD 	Provider/Program *	ABA SOLUTIONS, INC. 	Details
Approved By		Approved Date		

BEHAVIOR ANALYSIS SERVICES PLAN

Plan type:	New BASP 
Date of Plan:	07/06/2023  
Consumer's First Name:	Carrie
Consumer's Last Name:	Abner

13. Once the BASP is revised, the behavior analysis service provider will add a note for the LRC Chair or designee notifying them of the BASP submission. Navigate to the consumers record and select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. If the BASP Revision was submitted before the deadline, update the following fields:

- Program/Provider = enter the name of the behavior analysis service provider's agency
- Note Type = LRC Review
- Note Subtype = BASP Revisions
- Description = BASP Revision mm/dd/yy
- Note = Add details of what was revised
- Status = Pending
- Attachments = Add any attachments
- Recipient = LRC Chair

opd iConnect Carrie Abner | **Notes**
7/21/2023 10:16 AM

File Tools

Notes Details

Division *

Note By *

Note Date *

Program/Provider * [Details](#)

Note Type *

Note Sub-Type *

Description

Note

B I U 16px A

details of what was revised

Status *

Date Completed

14. From the **File** menu, select **Save and Close Notes**. Skip to Step 16.

15. If the BASP Revision was submitted after the deadline, the LRC Chair or designee will manage this as a new submission. Navigate to the consumers record and select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:

- a. Program/Provider = enter the name of the behavior analysis service provider's agency
- b. Note Type = LRC Review
- c. Note Subtype = BASP Submission
- d. Note = add details that the submission is after the deadline.
- e. Status = Pending
- f. Attachments = Add any attachments
- g. Recipient = LRC Chair

Behavioral Services

Notes Details

Division *

Note By *

Note Date *

Program/Provider *

Note Type *

Note Sub-Type *

Description

Note

Status *

Date Completed

Attachments

[Add Attachment](#)

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	7/3/2023		Unread		Remove

16. From the **File** menu, select **Save and Close Notes**. Skip to the [LRC Preliminary Review](#) section.

Role: Regional Clinical Workstream Worker

17. The LRC Chair or designee monitors **My Dashboard > Consumers > Notes > Pending** for incoming notes that the revised BASP revisions have been submitted.

18. The LRC Chair or designee will review the notes from the behavior analysis service provider by selecting the **LRC Review > BASP Submission** note.

Filters

Status Equal To AND

iConnect ID

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

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Description	Author	Status	
59217	Abner, Carrie	LRC Review	BASP Submission	06/20/2023	Revised BASP 6/20/23	Buck, Jennifer	Pending	☐
59217	Abner, Carrie	LRC Review	BASP Submission	07/03/2023	BASP Revision 7/3/23	Buck, Jennifer	Pending	☐

19. The LRC Chair or designee will review the revised BASP form. Navigate to the consumer's record and select the **Forms** tab.

Behavioral Services

Select the “**Behavior Analysis Services Plan**” form in Complete status. If the revised BASP is submitted before the deadline and was revised sufficiently, the LRC chair will review the updates without going through the LRC Review Meeting.

The screenshot displays the iConnect web interface. At the top, the iConnect logo is on the left, and user information (Carrie Abner, Last Updated by jBuck@apdcares.org at 7/3/2023 1:41:52 PM) and a 'Forms' link are on the right. Below the navigation bar, the 'Behavior Analysis Services Plan' form is shown. It includes a 'Consumer Forms' section with fields for Review (Initial), Review Date (07/03/2023), Division (APD), Approved By (Buck, Jennifer), Worker (Buck, Jennifer), Status (Complete), Provider/Program (ABA SOLUTIONS, INC.), and Approved Date (07/03/2023). A 'Note' section is also present. Below the form, a blue header reads 'BEHAVIOR ANALYSIS SERVICES PLAN'. At the bottom, there are fields for Plan type (Update with revision(s)), Date of Plan (07/03/2023), Consumer's First Name (Carrie), and Consumer's Last Name (Abner).

20. The LRC Chair or designee will notify the behavior analysis service provider the BASP has been received by responding to the existing LRC Review > BASP Submission note. Navigate to the consumers record and select the **Notes** tab. From the list, select the **LRC Review > BASP Submission note** in Pending status. The Note Details page displays. Update the following fields:
- Note Type = Remains LRC Review
 - Note Subtype = Update to BASP Received
 - Note = add details of review. Select Append Text to Note.
 - Status = Complete
 - Recipient = behavior analysis service provider

Behavioral Services

APD iConnect

Carrie Abner
Last Updated by jrbuck@apdcares.org
at 7/3/2023 1:46:36 PM

Notes

File Tools

Notes

Notes Details

Division * APD

Note By * Buck, Jennifer

Note Date * 07/03/2023

Program/Provider ABA SOLUTIONS, INC. Details

Note Type * LRC Review

Note Sub-Type BASP Received

Description BASP Revision 7/3/23

On 7/3/2023 at 1:46 PM, Jennifer Buck wrote:
revised per LRC Chair request and within deadline

Note

New Text

LRC chair received revised BASP

Append Text to Note

Status * Complete

Date Completed 07/03/2023

Attachments

Add Attachment

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient

Clear

21. From the **File** menu, select **Save and Close Notes**. Proceed to the [LRC Meeting > Approved](#) section.

1kiii. Not Approved

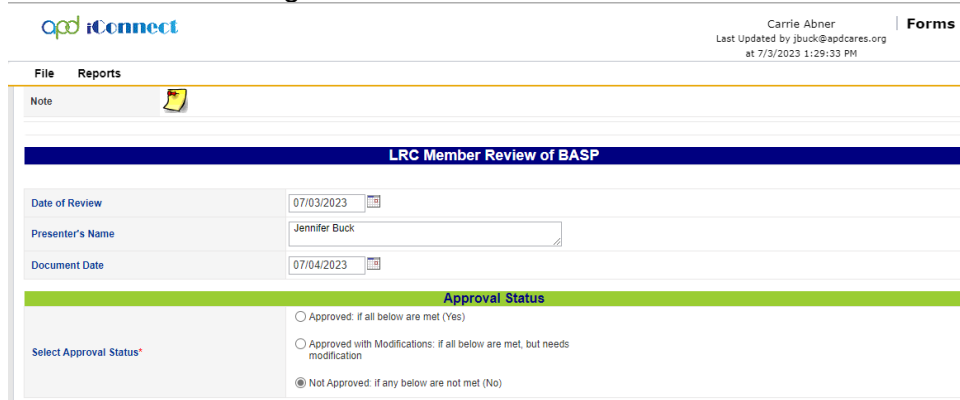
The LRC Chair or designee will update the LRC Member Review of BASP form and the LRC Case Review and Approval Form and notify the behavior analysis service provider via a note in APD iConnect. The behavior analysis service provider must update the BASP and resubmit within 14 working days. If the behavior analysis service provider had started services, he/she would have to stop. This plan may not be used until revisions have been submitted and approved. After 14 working days, the behavior analysis service provider would have to restart the [BASP submission/completion](#) process.

Role: Regional Clinical Workstream Worker

1. The LRC Chair or designee will update the LRC Member Review of BASP form in APD iConnect. Navigate to the consumers record and select the **Forms** tab. From the list view, select the **LRC Member Review of BASP** form. The Form Details page displays. Update the following fields:

Behavioral Services

- a. Approval Status = Not Approved
- b. Status = Pending



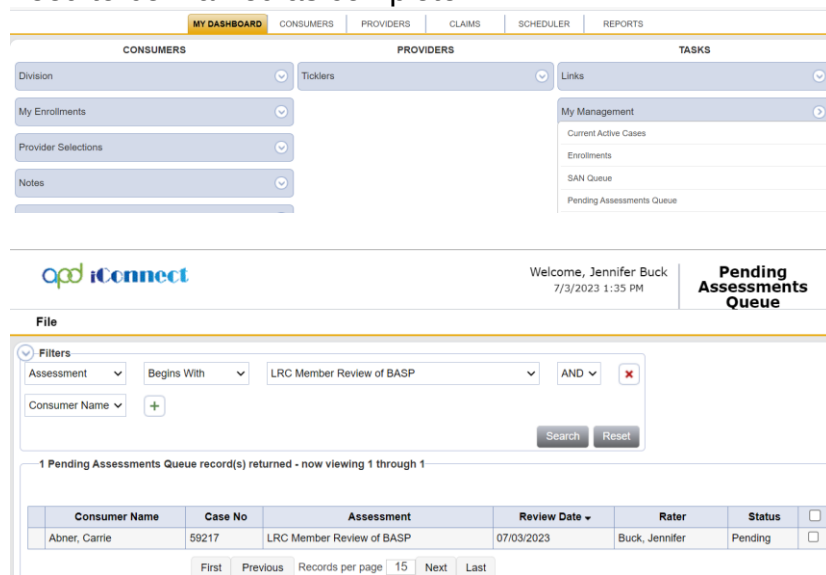
The screenshot shows the 'LRC Member Review of BASP' form. At the top, there is a header with the 'iConnect' logo, user information for Carrie Abner, and a 'Forms' tab. Below the header, there is a 'File' menu and a 'Reports' tab. The form itself has a 'Note' section with a yellow icon. The main section is titled 'LRC Member Review of BASP' and contains fields for 'Date of Review' (07/03/2023), 'Presenter's Name' (Jennifer Buck), and 'Document Date' (07/04/2023). Below these fields is an 'Approval Status' section with three radio buttons: 'Approved: if all below are met (Yes)', 'Approved with Modifications: if all below are met, but needs modification', and 'Not Approved: if any below are not met (No)'. The 'Not Approved' option is selected.

2. From the **File** menu, select **Save and Close Form**.



Note

The LRC Chair or designee can use the Pending status to create a queue on **My Dashboard > Pending Assessments Queue** of BASP's that are approved with modifications and awaiting resubmission from the behavior analysis service provider. If Provider never resubmits, use this same queue to identify forms that need to be marked as complete.



The screenshot shows the 'iConnect' system interface. At the top, there is a navigation bar with tabs for 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'CLAIMS', 'SCHEDULER', and 'REPORTS'. Below this, there are three main sections: 'CONSUMERS', 'PROVIDERS', and 'TASKS'. The 'CONSUMERS' section has a dropdown for 'Division' and buttons for 'My Enrollments', 'Provider Selections', and 'Notes'. The 'PROVIDERS' section has a dropdown for 'Ticklers'. The 'TASKS' section has a dropdown for 'Links' and a 'My Management' section with links to 'Current Active Cases', 'Enrollments', 'SAN Queue', and 'Pending Assessments Queue'. Below these sections, there is a 'File' menu and a 'Welcome, Jennifer Buck' message. The 'File' menu has a 'Filters' section with dropdowns for 'Assessment' (set to 'LRC Member Review of BASP') and 'Consumer Name'. Below the filters, there is a 'Search' button and a 'Reset' button. The search results show '1 Pending Assessments Queue record(s) returned - now viewing 1 through 1'. The table below shows the following data:

Consumer Name	Case No	Assessment	Review Date	Rater	Status	
Abner, Carrie	59217	LRC Member Review of BASP	07/03/2023	Buck, Jennifer	Pending	☐

At the bottom of the table, there are navigation links: 'First', 'Previous', 'Records per page 15', 'Next', and 'Last'.

3. The LRC Chair will also update the LRC Case Review and Approval form. Navigate to the consumers record and select the **Forms** tab. From the list view, select the **LRC Case Review and Approval** form. The Form Details page displays. Update the following fields:
 - a. Decision section > BASP Approved/Action = No
 - b. Status = Pending

Behavioral Services

LRC Case Review and Approval (Attachment Q)	
Review Date:	07/03/2023
Consumer Name:	Carrie Abner
Support Coordinator:	
Presenter:	Jennifer Buck
Lead Reviewer:	
Location of Services:	
Method or Type of Review	
Review Type:	Annual Update/Re-Approval Revised Full BASP Data Review Behavior Assistant Request Safety Plan Other
Type of Review:	In-Person LRC Presentation
Decision	
BASP Approved / Action:	No
Recommended Review Period:	12 Month
Next Review Specific Date:	07/05/2024
Date of BASP Presented:	06/30/2023
Number of Months BASP is approved for from the date of this LRC Review:	12

- From the **File** menu, select **Save and Close Forms**.



Note

The LRC Chair or designee can use the Pending status to create a queue on **My Dashboard > Pending Assessments Queue** of BASP's that are approved with modifications and awaiting resubmission from the behavior analysis service provider. If Provider never resubmits, use this same queue to identify forms that need to be marked as complete.

MY DASHBOARD		CONSUMERS	PROVIDERS	CLAIMS	SCHEDULER	REPORTS														
Division	My Enrollments	Provider Selections	Notes	Ticklers	Links	My Management Current Active Cases Enrollments SAN Queue Pending Assessments Queue														
Welcome, Jennifer Buck 7/3/2023 1:36 PM Pending Assessments Queue																				
File Filters Assessment: Begins With: LRC Case Review and Approval AND Consumer Name: + Search Reset 1 Pending Assessments Queue record(s) returned - now viewing 1 through 1 <table border="1"> <thead> <tr> <th>Consumer Name</th> <th>Case No</th> <th>Assessment</th> <th>Review Date</th> <th>Rater</th> <th>Status</th> <th></th> </tr> </thead> <tbody> <tr> <td>Abner, Carrie</td> <td>59217</td> <td>LRC Case Review and Approval</td> <td>07/03/2023</td> <td>Buck, Jennifer</td> <td>Pending</td> <td>☐</td> </tr> </tbody> </table> First Previous Records per page: 15 Next Last							Consumer Name	Case No	Assessment	Review Date	Rater	Status		Abner, Carrie	59217	LRC Case Review and Approval	07/03/2023	Buck, Jennifer	Pending	☐
Consumer Name	Case No	Assessment	Review Date	Rater	Status															
Abner, Carrie	59217	LRC Case Review and Approval	07/03/2023	Buck, Jennifer	Pending	☐														

- The LRC Chair will reverse the status of the BASP so the behavior analysis service provider can make updates. From the consumer's record, navigate to the Forms tab. Select the

Behavioral Services

completed Behavior Analysis Service Plan form from the list. From the **File** menu, select **Reverse Status**. The status of the form changes from Complete to Pending.

APD iConnect

Carrie Abner
Last Updated by jibuck@apdcares.org
at 7/3/2023 1:05:25 PM

Forms

File

History
Duplicate Assessment
Reverse Status
Print
Close Forms
Unsave

Worker * Buck, Jennifer Details

Status * Complete

Provider/Program * ABA SOLUTIONS, INC. Details

Approved By Buck, Jennifer Details

Approved Date 07/03/2023

Note

BEHAVIOR ANALYSIS SERVICES PLAN

Plan type: New BASP

Date of Plan: 07/03/2023

6. The LRC Chair notifies the behavior analysis service provider the BASP was not approved via a note in APD iConnect. Navigate to the consumers record and select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
- Note Type = LRC Review
 - Note Subtype = Decision – Not Approved
 - Status = Complete
 - Recipient = behavior analysis service provider & WSC

APD iConnect

Carrie Abner
Last Updated by jibuck@apdcares.org
at 7/3/2023 2:02 PM

Notes

File Tools

Notes Details

Division * APD

Note By * Buck, Jennifer

Note Date * 07/03/2023

Program/Provider ABA SOLUTIONS, INC.

Note Type * LRC Review

Note Sub-Type Decision - Approved with Modification

Description

Note

Status * Complete

Date Completed 07/03/2023

Attachments

Add Attachment

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	7/3/2023		Unread		Remove

Behavioral Services

7. From the **File** menu, select **Save and Close Notes**.
8. The behavior analysis service provider has 14 working days to resubmit.

Role: WSC/CDC

9. The WSC monitors **My Dashboard > Consumers > Notes > Complete** for notification the BASP was not approved. This note serves as notification only. The WSC will not proceed with creating more/updating authorizations until the BASP is fully approved.

Role: Service Provider, Service Provider Worker

10. The behavior analysis service provider monitors **My Dashboard > Consumers > Notes > Complete** for notification the BASP was not approved. The behavior analysis service provider will select the **LRC Review > Decision – Not Approved** note from the list view and review the reasons the BASP was not approved in the notes section. In addition, the behavior analysis service provider can review the LRC Member Review of BASP and LRC Case Review and Approval form. The forms are read only for the behavior analysis service provider.
11. The behavior analysis service provider will update the Behavioral Analysis Service Plan (BASP) form in APD iConnect. Navigate to the consumers record and select the **Forms** tab. From the forms list view, select the **Behavioral Analysis Service Plan** (BASP) form that is in Pending status. Update the following fields:
 - a. Per instruction in the LRC Review > Decision – Not Approved note, update any additional questions in the form.
 - b. Status = Complete
12. From the **File** menu, select **Save and Close Form**.

Behavioral Services

The screenshot displays the iConnect system interface for the Behavior Analysis Services Plan (BASP) form. The top navigation bar shows the iConnect logo, the user name 'Carrie Abner', the date '7/21/2023 10:23 AM', and a 'Forms' button. The main content area is titled 'File' and contains a dropdown menu for 'Please Select Type: Behavior Analysis Services Plan (BASP)'. Below this is the 'Consumer Forms' section, which includes fields for 'Review' (Initial), 'Review Date' (07/21/2023), 'Division' (APD), 'Approved By' (Buck, Jennifer), 'Worker' (Buck, Jennifer), 'Status' (Complete), 'Provider/Program' (ABA SOLUTIONS, INC.), and 'Approved Date' (07/21/2023). A blue bar with the text 'BEHAVIOR ANALYSIS SERVICES PLAN' is positioned below the form. The bottom section of the form includes fields for 'Plan type' (New BASP), 'Date of Plan' (07/06/2023), 'Consumer's First Name' (Carrie), and 'Consumer's Last Name' (Abner).

13. Once the BASP is revised, the behavior analysis service provider will add a note for the LRC Chair or designee notifying them of the BASP submission. Navigate to the consumers record and select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. If the BASP Revision was submitted before the deadline, update the following fields:
- Program/Provider = enter the name of the behavior analysis service provider's agency
 - Note Type = LRC Review
 - Note Subtype = BASP Submission
 - Description = BASP Revision mm/dd/yy
 - Note = Add details of what was revised
 - Status = Pending
 - Attachments = Add any attachments
 - Recipient = LRC Chair

Behavioral Services

opd iConnect Carrie Abner
Last Updated by j buck@apdcares.org
at 7/3/2023 1:46:36 PM **Notes**

File Tools

Notes

Notes Details

Division * APD ▾

Note By * Buck, Jennifer

Note Date * 07/03/2023

Program/Provider ABA SOLUTIONS, INC. ▾ Details

Note Type * LRC Review ▾

Note Sub-Type BASP Received ▾

Description BASP Revision 7/3/23

On 7/3/2023 at 1:46 PM, Jennifer Buck wrote:
revised per LRC Chair request and within deadline

Note

New Text

B I U 10pt A ▾

LRC chair received revised BASP

Append Text to Note

Status * Pending ▾

Date Completed

14. From the **File** menu, select **Save and Close Notes**. Skip to Step 16.

15. If the BASP Revision was submitted after the deadline, the LRC Chair or designee will manage this as a new submission.

Update the following fields:

- Note Type = LRC Review
- Note Subtype = BASP Submission
- Note = add details that the submission is after the deadline.
- Status = Pending
- Attachments = Add any attachments
- Recipient = LRC Chair

16. From the **File** menu, select **Save and Close Notes**. Skip to the [LRC Preliminary Review](#) section.

Role: Regional Clinical Workstream Worker

17. The LRC Chair or designee will review the notes from the behavior analysis service provider by selecting the **LRC Review > BASP Submission** note.

Behavioral Services

APD iConnect

Welcome, Jennifer Buck | Notes
7/3/2023 1:46 PM

File Tools

Filters

Status Equal To Pending AND

iConnect ID

Search Reset

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

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Description	Author	Status
59217	Abner, Carrie	LRC Review	BASP Submission	06/20/2023	Revised BASP 6/20/23	Buck, Jennifer	Pending
59217	Abner, Carrie	LRC Review	BASP Submission	07/03/2023	BASP Revision 7/3/23	Buck, Jennifer	Pending

18. The LRC Chair or designee will review the revised BASP form. Navigate to the consumer's record and select the Forms tab. Select the **"Behavior Analysis Services Plan"** form in Complete status. If the revised BASP is submitted before the deadline and was revised sufficiently, the LRC chair will review the updates without going through the LRC Meeting.

APD iConnect

Carrie Abner
Last Updated by jBuck@apdcares.org
at 7/3/2023 1:41:52 PM

File Reports

Behavior Analysis Services Plan

Consumer Forms

Review * Initial Worker * Buck, Jennifer Details

Review Date * 07/03/2023 Status * Complete

Division * APD Provider/Program ABA SOLUTIONS, INC. Details

Approved By Buck, Jennifer Approved Date 07/03/2023

Note

BEHAVIOR ANALYSIS SERVICES PLAN

Plan type: Update with revision(s)

Date of Plan: 07/03/2023

Consumer's First Name: Carrie

Consumer's Last Name: Abner

19. The LRC Chair or designee will notify the behavior analysis service provider the BASP has been received by responding to the existing LRC Review > BASP Submission note. Navigate to the consumers record and select the **Notes** tab. From the list, select the **LRC Review > BASP Submission note** in Pending status. The Note Details page displays. Update the following fields:
- Note Type = Remains LRC Review
 - Note Subtype = Update to BASP Received
 - Note = add details of review. Select Append Text to Note.
 - Status = Complete
 - Recipient = behavior analysis service provider

Behavioral Services



Carrie Abner
Last Updated by j buck@apdcares.org
at 7/3/2023 1:46:36 PM

Notes

File **Tools**

Notes

Notes Details

Division *

APD

Note By *

Buck, Jennifer

Note Date *

07/03/2023

Program/Provider

ABA SOLUTIONS, INC.

Details

Note Type *

LRC Review

Note Sub-Type

BASP Received

Description

BASP Revision 7/3/23

Note

On 7/3/2023 at 1:46 PM, Jennifer Buck wrote:
revised per LRC Chair request and within deadline

New Text

B **I** **U** 10pt **A**

LRC chair received revised [BASP](#)

Append Text to Note

Status *

Pending

Date Completed

20. From the **File** menu, select **Save and Close Notes**. Proceed to the [LRC Meeting > Approved](#) or [LRC Meeting > Approved with Modification](#) section.

2. Service Eligibility Review Process

New consumers who need behavioral services or consumers who currently receive behavioral services must complete the service eligibility review process initially and at least annually as part of the cost plan review process. Some services are reviewed twice a year, or more if needed. During the LRC Meeting the BASE is reviewed as part of the medical necessity review and a clinical review of the BASP is completed.

The Service Eligibility Review process includes the following steps:

1. WSC sends a note to the Region Clinical Workstream Lead in APD iConnect requesting a BASE to be completed.
NOTE: the BASE cannot be completed until the BASP has been completed by the behavior analysis service provider.
2. The Region Clinical Workstream Lead assigns the BASE to a regional behavioral analyst.
3. The regional behavioral analyst reviews documentation to determine whether service eligibility criteria are supported by submitted documentation.
4. The regional behavioral analyst completes the BASE form.
5. The regional behavioral analyst prints and signs the BASE.
6. The regional behavioral analyst informs WSC and behavior analysis service provider of eligibility via BASE Completed note.
7. If the criteria for eligibility is not met, the WSC works with behavior analysis service provider to update the BASP, provide additional documentation, and resubmit.
8. If there is a reduction in services, the WSC will go through the cost plan review process with the Region Waiver Workstream Lead to adjust the services.

2a. BASE Requested

Role: WSC/CDC

1. Annually, when the cost plan review process begins, the WSC requests a BASE to be completed via a note in APD iConnect. A BASE is also completed during the LRC Meeting process.
2. To request a BASE, navigate to the consumers record and select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - a. Program/Provider = enter the name of the WSC agency
 - b. Note Type = Behavioral Services
 - c. Note Subtype = BASE Request
 - d. Note = list services and units needed, including ratios
 - e. Status = Pending

Behavioral Services

- f. Recipient = Region Clinical Workstream Lead
- g. Attachments = documentation needed for a medical necessity review. A completed BASP or any available documentation that shows the individual meets eligibility criteria must be on file before proceeding.



Carrie Abner | **Notes**
7/3/2023 2:34 PM

FileTools

Notes Details

Division *

APD ▼

Note By *

Buck, Jennifer ▼

Note Date *

07/03/2023

Program/Provider *

1 CARE LLC ▼

Details

Note Type *

Behavioral Services ▼

Note Sub-Type

BASE Request ▼

Description

Note

B I U 16px A

requesting BASE. several documents attached

Status *

Pending ▼

Date Completed

Attachments

Add Attachment

Document	Description	Category	Action
RPsgsts1	script from MD		Remove
RSGIU77654	Discharge Summary		Remove

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	7/3/2023		Unread		Remove

- 3. From the **File** menu, select **Save and Close Notes**.

Role: Region Clinical Workstream Lead

- 2. The Region Clinical Workstream Lead monitors **My Dashboard > Consumers > Notes > Pending** for incoming notes as notification to assign the BASE.

Behavioral Services

MY DASHBOARD

CONSUMERS

PROVIDERS

CLAIMS

SCHEDUL

CONSUMERS

Division

My Enrollments

Provider Selections

Notes

Complete 11

Pending 6

PROVIDERS

Ticklers

oConnect

Welcome, Jennifer Buck

Notes

7/3/2023 2:36 PM

File

Tools

Filters

Status

Equal To

Pending

AND

×

iConnect ID

+

Search

Reset

6 Notes record(s) returned - now viewing 1 through 6

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Description	Author	Status	
59217	Abner, Carrie	LRC Review	BASP Submission	07/03/2023	BASP Revision 7/3/23	Buck, Jennifer	Pending	☐
59217	Abner, Carrie	Behavioral Services	BASE Request	07/03/2023		Buck, Jennifer	Pending	☐

3. The Region Clinical Workstream Lead will assign a regional behavioral analyst to complete the BASE and notify him/her through the BASE Request note. Select the **Behavioral Services > BASE Request note**. The Note Details page displays. Update the following fields:
 - a. Note = add details about the assignment. Click **Append Text to Note**.
 - b. Recipient = assign the regional behavioral analyst
 - c. Status = Update to Complete

Behavioral Services

APD iConnect

Carrie Abner
Last Updated by jBuck@apdcares.org
at 7/3/2023 2:35:09 PM

Notes

File Tools

Notes

Notes Details

Division * APD

Note By * Buck, Jennifer

Note Date * 07/03/2023

Program/Provider 1 CARE LLC Details

Note Type * Behavioral Services

Note Sub-Type BASE Request

Description

On 7/3/2023 at 2:35 PM, Jennifer Buck wrote:
requesting BASE. several documents attached

Note

New Text

B I U 10pt A

assigning to Regional Behavioral Analyst

Append Text to Note

Status * Complete

Date Completed 07/03/2023

Attachments

Add Attachment

Document	Description	Category	Action
RPsgets1	script from MD		Remove
RSGIU77654	Discharge Summary		Remove

Note Recipients

Add Note Recipient:

Clear

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	07/03/2023		Unread		Remove

4. From the **File** menu, select **Save and Close Notes**.

2b. BASE Completed

Role: Region Clinical Workstream Worker

1. The regional behavioral analyst monitors **My Dashboard > Consumers > Notes > Complete** for incoming notes as notification to complete the BASE. Requests to review a revised BASE that initially did not meet criteria for eligibility are also visible in this queue.

Behavioral Services

MY DASHBOARD | CONSUMERS | PROVIDERS | CLAIMS | SCHEDULE

CONSUMERS

Division

My Enrollments

Provider Selections

Notes

Notes	Count
Complete	11
Pending	6

PROVIDERS

Ticklers

- The regional behavioral analyst will select the **Behavioral Services > BASE Request** note from the list view and review the attached documentation. The BASP form already saved on the consumer's record in iConnect is also reviewed, if available. If this is a new request, and the service is new to the individual, he/she may not yet have a BASP.

APD iConnect | Welcome, Jennifer Buck | Notes | 7/3/2023 2:40 PM

File Tools

Filters

Status Equal To Complete AND

iConnect ID

Search Reset

12 Notes record(s) returned - now viewing 1 through 12

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Description	Author	Status	
59217	Abner, Carrie	Behavioral Services	Behavioral Assessment	07/03/2023	optional	Buck, Jennifer	Complete	☐
59217	Abner, Carrie	LRC Review	LRC Review Requested	07/03/2023		Buck, Jennifer	Complete	☐
59217	Abner, Carrie	LRC Review	BASP Received - Revisions	07/03/2023	Revisions Requested	Buck, Jennifer	Complete	☐
59217	Abner, Carrie	LRC Review	Review Scheduled	07/03/2023	Date scheduled mm/dd/yy	Buck, Jennifer	Complete	☐
59217	Abner, Carrie	LRC Review	Decision - Approved	07/03/2023		Buck, Jennifer	Complete	☐
59217	Abner, Carrie	LRC Review	Decision - Approved with Modification	07/03/2023		Buck, Jennifer	Complete	☐
59217	Abner, Carrie	Behavioral Services	BASE Request	07/03/2023		Buck, Jennifer	Complete	☐
59217	Abner, Carrie	Behavioral Services	BASQR Completed	06/21/2023	Quarter 3	Buck, Jennifer	Complete	☐

- The regional behavioral analyst will begin the BASE form in APD iConnect. Navigate to the consumers record and select the **Forms** tab. From the **File** menu, select **Add Form**. Select the **"LRC Chair BASE"** form. The Form Details page displays. Update the following fields:
 - Review = select As Needed
 - Review Date = defaults to today
 - Division = defaults to APD
 - Worker = pre-populated with your name
 - Provider/Program = leave blank
 - Status = defaults to Draft. Will be changed to Complete later in the workflow.

Behavioral Services

APD iConnect Carrie Abner
7/3/2023 2:42 PM | Forms

File

Please Select Type: LRC Chair BASE

Consumer Forms

Review * As Needed Worker * Buck, Jennifer Clear Details

Review Date * 07/03/2023 Status * Draft

Division * APD Provider/Program

Approved By Approved Date

ATTACHMENT E

LRC Chair Review of Behavior Analysis Services Eligibility (BASE Form)

Note: This is only a recommendation of eligibility for behavioral services, not a determination of medical necessity or an approval for the rate, hours or cost plan.

Consumer Name:

First Name Carrie

Middle Name R

Last Name Abner

Suffix

Review Date: * 07/03/2023

Support Coordinator:

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

Name	ID
Reed, Monica	2498

Search

LRC Chair or Designee: Jennifer Buck 37 characters remaining

Agency Senior Behavior Analyst: Sally Smith

Check all services for which eligibility was reviewed:

Services:

A. Behavior Analysis Services ☒

4. Complete the remaining questions in the form, saving several times along the way. It may take more than one day to complete this form.



Note

If the recommendation is intensive behavioral Residential Habilitation services, the IB Matrix must also be completed outside of APD iConnect then attached to a note in APD iConnect. This note must be added before the LRC Chair BASE form is saved in Complete status.

1. Select the **Note Icon** at the top of the BASE form.
 2. The Note Details page displays. Update the following fields:
 - a. Cost Plan Review Note = No
 - b. Note Type = Behavioral Services
 - c. Note Subtype = BASE Completed
 - d. Description = IB Matrix
 - e. Status = Complete
 - f. Attachments = IB Matrix
 - g. Recipient = None
 3. From the **File** menu, select **Save and Close Notes**. The page refreshes and you are returned to the LRC Chair BASE form
5. Once the review is complete, the Regional Behavioral Analyst will determine if the criteria has met for behavioral services eligibility. Three possible outcomes exist:

Behavioral Services

- a. [Consumer meets criteria for behavioral services eligibility](#)
 - b. [Consumer meets criteria for eligibility with a decrease in services](#)
 - c. [Consumer does not meet criteria for eligibility. Additional Documentation Required.](#)
6. From the **File** menu, select **Save Form**, NOT Save and Close Form.

2bi. Consumer Meets Criteria for Behavioral Services Eligibility

Role: Region Clinical Workstream Worker

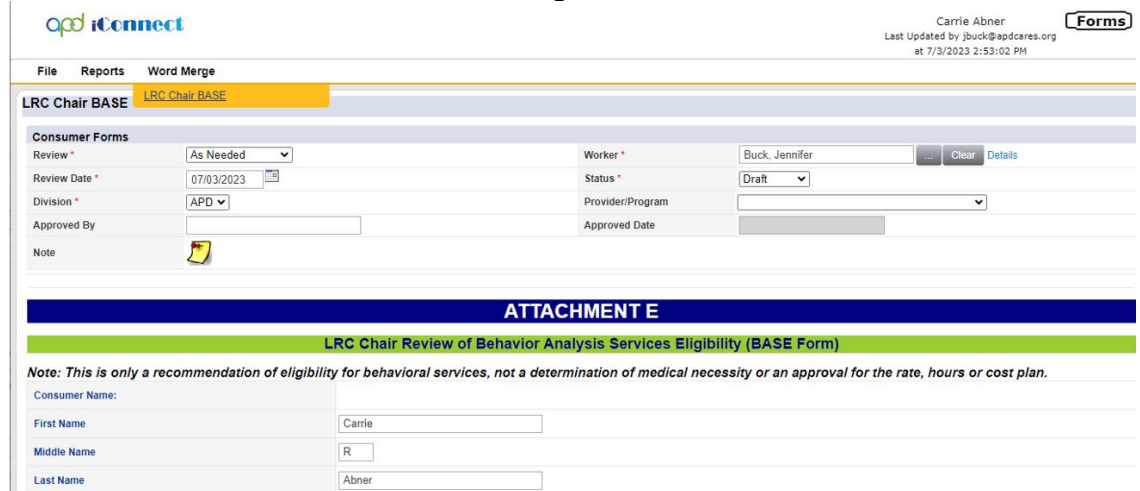
1. The regional behavioral analyst will add the recommendation on the BASE form. If the BASE form is not already open, navigate to the consumer's **Forms** tab. Select the **LRC Chair BASE** form from the list. Update the following fields:
 - a. Comments/Justification = enter justification for the behavioral services
 - b. Units for the Review Period = enter units
 - c. Fading Schedule = enter details if applicable
 - d. Eligibility = Eligible
 - e. Eligibility/Ineligibility Comments = add additional details if needed
 - f. Next Review Date = enter date of next review
 - g. LRC Chair or Designee = enter the name of the LRC Chair. This serves as the signature.
 - h. Status = Complete

A. Units for the Review Period:	35
A. Fading Schedule:	fading schedule details
A. Eligibility	
☒ Eligible ☐ Ineligible	
A. Eligibility/Ineligibility Comments	eligibility comments
A. Next Review Date:	07/01/2024 
A. LRC Chair or Designee*:	Jennifer Buck, BCBA

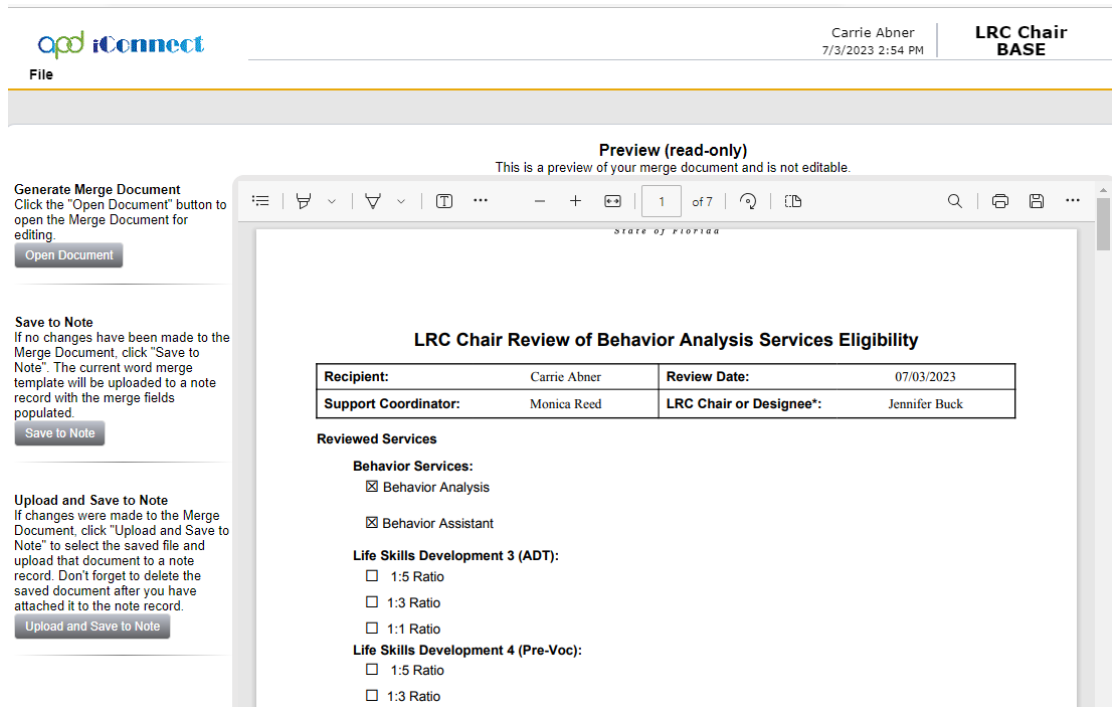
2. From the **File** menu, select **Save Forms**, NOT Save and Close Forms.

Behavioral Services

- From the open BASE form, the regional behavioral analyst will generate the BASE Word Merge. From the **Word Merge** menu, select the **LRC Chair BASE** word merge.

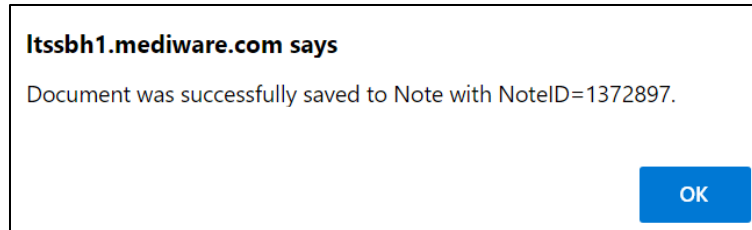


- The Word Merge preview window displays. Select **Save to Note**.

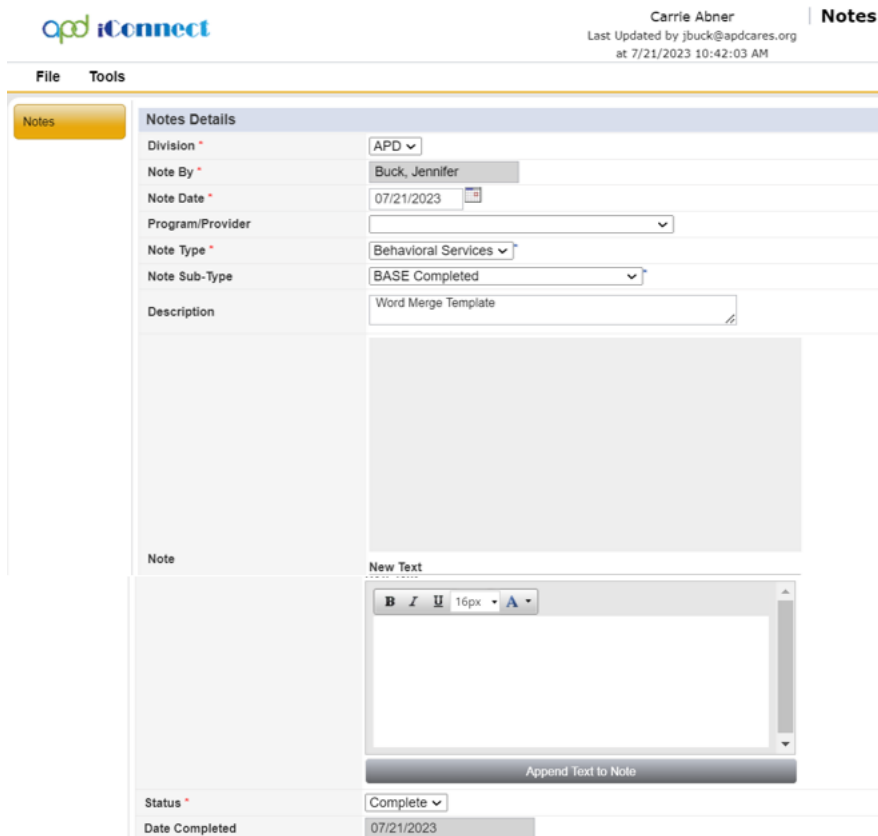


- A notification message displays confirming the LRC Chair BASE Word Merge was saved to a note. Click **Okay**.

Behavioral Services



7. The Note Details page displays. Notify the WSC that the consumer meets criteria for behavioral services eligibility. Update the following fields:
 - a. Division = select APD
 - b. Note Type = Update to Behavioral Services
 - c. Note SubType = BASE Completed
 - d. Description = defaults to Word Merge Template. Update if desired.
 - e. Note = optional
 - f. Status = Complete
 - g. Attachment = signed BASE
 - h. Recipients = WSC, behavior analysis service provider, Region Clinical Workstream Lead

A screenshot of the iConnect software interface. At the top, the "iConnect" logo is on the left, and user information "Carrie Abner" and "Last Updated by jibuck@apdcares.org at 7/21/2023 10:42:03 AM" is on the right. Below this is a "Notes" tab. The main area is titled "Notes Details" and contains several fields: "Division" (dropdown menu showing "APD"), "Note By" (text field with "Buck, Jennifer"), "Note Date" (calendar icon showing "07/21/2023"), "Program/Provider" (dropdown menu), "Note Type" (dropdown menu showing "Behavioral Services"), "Note Sub-Type" (dropdown menu showing "BASE Completed"), and "Description" (text field with "Word Merge Template"). Below these fields is a large text area labeled "Note". At the bottom, there is a "New Text" section with a rich text editor toolbar (bold, italic, underline, font size 16px, color) and a large text input area. Below the text input area is a button labeled "Append Text to Note". At the very bottom, there are fields for "Status" (dropdown menu showing "Complete") and "Date Completed" (text field with "07/21/2023").

8. From the **File** menu, select **Save and Close Notes**.

Behavioral Services

9. For more detailed general Word Merge instruction, see the [As Needed: Word Merges](#) section.

Role: WSC/CDC

10. The WSC monitors **My Dashboard > Consumers > Notes** for notification the BASE was completed. The WSC may need to create more authorizations following the current cost plan processes.

Role: Service Provider, Service Provider Worker

11. The behavior analysis service provider monitors **My Dashboard > Consumers > Notes** for notification the BASE was completed as notification only.

Role: Region Clinical Workstream Lead

12. The Region Clinical Workstream Lead monitors **My Dashboard > Consumers > Notes** for notification the BASE was completed as notification only.

2bii. Consumer Meets Criteria for Eligibility with a Decrease in Services

Role: Region Clinical Workstream Worker

1. The regional behavioral analyst will add the recommendation on the BASE form. If the BASE form is not already open, navigate to the consumer's **Forms** tab. Select the **LRC Chair BASE** form from the list. Update the following fields:
 - a. Comments/Justification = enter justification for the behavioral services
 - b. Units for the Review Period = enter units
 - c. Fading Schedule = enter details if applicable
 - d. Eligibility = Eligible
 - e. Eligibility/Ineligibility Comments = add additional details if needed
 - f. Next Review Date = enter date of next review
 - g. LRC Chair or Designee = enter the name of the LRC Chair. This serves as the signature.
 - h. Status = Update to Complete

Behavioral Services

A. Units for the Review Period:	35
A. Fading Schedule:	fading schedule details
A. Eligibility	
☒ Eligible ☐ Ineligible	
A. Eligibility/Ineligibility Comments	eligibility comments
A. Next Review Date:	07/01/2024 
A. LRC Chair or Designee*:	Jennifer Buck, BCBA

- From the **File** menu, select **Save Forms**, NOT Save and Close Forms.
- From the open BASE form, the regional behavioral analyst will generate the BASE Word Merge. From the **Word Merge** menu, select the **LRC Chair BASE** word merge.



Carrie Abner
 Last Updated by j buck@apdcares.org
 at 7/18/2023 3:53:46 PM

Forms

File	Reports	Word Merge
LRC Chair BASE		
Consumer Forms		
Review *	Initial	Worker *
Review Date *	07/18/2023	Status *
Division *	APD	Provider/Program
Approved By	Buck, Jennifer Details	Approved Date
Note		

ATTACHMENT E

LRC Chair Review of Behavior Analysis Services Eligibility (BASE Form)

Note: This is only a recommendation of eligibility for behavioral services, not a determination of medical necessity or a approval for the rate, hours or cost plan.

Behavioral Services

- The Word Merge preview window displays. Select **Save to Note**.

The screenshot shows a web application interface for the LRC Chair Review of Behavior Analysis Services Eligibility. The top header includes the 'iConnect' logo, the user 'Carrie Abner', the date '7/3/2023 2:54 PM', and the title 'LRC Chair BASE'. Below the header is a 'File' menu. The main content area is titled 'Preview (read-only)' and contains a form with the following sections:

- Generate Merge Document:** Click the 'Open Document' button to open the Merge Document for editing.
- Save to Note:** If no changes have been made to the Merge Document, click 'Save to Note'. The current word merge template will be uploaded to a note record with the merge fields populated.
- Upload and Save to Note:** If changes were made to the Merge Document, click 'Upload and Save to Note' to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.

The form itself is titled 'LRC Chair Review of Behavior Analysis Services Eligibility' and contains the following fields:

Recipient:	Carrie Abner	Review Date:	07/03/2023
Support Coordinator:	Monica Reed	LRC Chair or Designee:	Jennifer Buck

Reviewed Services

- Behavior Services:**
 - ☒ Behavior Analysis
 - ☒ Behavior Assistant
- Life Skills Development 3 (ADT):**
 - ☐ 1:5 Ratio
 - ☐ 1:3 Ratio
 - ☐ 1:1 Ratio
- Life Skills Development 4 (Pre-Voc):**
 - ☐ 1:5 Ratio
 - ☐ 1:3 Ratio

- A notification message displays confirming the LRC Chair BASE Word Merge was saved to a note. Click **Okay**.

The notification message is a white box with a black border. It contains the following text:

Itssbh1.mediware.com says

Document was successfully saved to Note with NoteID=1372897.

At the bottom right of the box is a blue button with the text 'OK'.

- The Note Details page displays. Notify the WSC that the consumer meets criteria for behavioral services eligibility. Update the following fields:
 - Division = select APD
 - Note Type = Update to Behavioral Services
 - Note SubType = BASE Completed
 - Description = defaults to Word Merge Template. Update if desired.
 - Note = optional
 - Status = Complete
 - Attachment = signed BASE
 - Recipients = WSC, behavior analysis service provider, Region Waiver Workstream Worker, Region Clinical Workstream Lead

Behavioral Services

qcd iConnect Carrie Abner
Last Updated by j buck@apdcares.org
at 7/21/2023 10:42:03 AM **Notes**

File Tools

Notes

Notes Details

Division * APD ▾

Note By * Buck, Jennifer

Note Date * 07/21/2023

Program/Provider ▾

Note Type * Behavioral Services ▾

Note Sub-Type BASE Completed ▾

Description Word Merge Template

Note

New Text

Append Text to Note

Status * Complete ▾

Date Completed 07/21/2023

7. From the **File** menu, select **Save and Close Notes**.
8. For more detailed general Word Merge instruction, see the [As Needed: Word Merges](#) section.

Role: WSC/CDC

9. The WSC monitors **My Dashboard > Consumers > Notes > Complete** for notification the BASE was completed and a decrease in services is needed. The WSC will work with the Region Waiver Workstream Worker to determine how the services will be reduced. The WSC will go through the cost plan review process to adjust the services.

qcd iConnect Welcome, Jennifer Buck | **Notes**
7/3/2023 3:05 PM

File Tools

Filters

Status ▾ Equal To ▾ Complete ▾ AND ▾ X

IConnect ID ▾ +

Search Reset

13 Notes record(s) returned - now viewing 1 through 13

IConnect ID	Consumer	Note Type	Note Sub Type ▾	Note Date	Subject	Author	Status	
59217	Abner, Carrie	Behavioral Services	BASE Completed	07/03/2023		Buck, Jennifer	Complete	☐
59217	Abner, Carrie	Behavioral Services	BASE Request	07/03/2023		Buck, Jennifer	Complete	☐

Role: Regional Waiver Workstream Worker

10. The Region Waiver Workstream Worker monitors **My Dashboard > Consumers > Notes > Complete** for notification the BASE was completed, and services will be reduced.

Role: Service Provider

11. The behavior analysis service provider monitors **My Dashboard > Consumers > Notes > Complete** for notification the BASE was completed with a decrease in services as notification only.

2biii. Consumer Does Not Meet Criteria for Eligibility. Additional Documentation Required.

Role: Region Clinical Workstream Worker

1. The regional behavioral analyst will update the BASE form. If the BASE form is not already open, navigate to the consumer's **Forms** tab. Select the **LRC Chair BASE** form from the list. Update the following fields:
 - a. Comments/Justification = enter comments about the missing documentation.
 - b. Status = Pending



Carrie Abner
Last Updated by jrbuck@apdcares.org
at 7/3/2023 2:53:02 PM

Forms

File Reports Word Merge

LRC Chair BASE

Consumer Forms

Review * As Needed	Worker * Buck, Jennifer Clear Details
Review Date * 07/03/2023	Status * Pending
Division * APD	Provider/Program
Approved By 	Approved Date
Note 	

ATTACHMENT E

LRC Chair Review of Behavior Analysis Services Eligibility (BASE Form)

Note: This is only a recommendation of eligibility for behavioral services, not a determination of medical necessity or an approval for the rate, hours or cost plan.

Consumer Name:	
First Name	Carrie
Middle Name	R
Last Name	Abner

Behavioral Services

Check all services for which eligibility was reviewed:

Service(s):	
A. Behavior Analysis Services	☒
B. Behavior Assistant Services	☒
C. Life Skills Development 3 (ADT)	☐
D. Life Skills Development 4 (Pre-Voc)	☐
E. Residential Habilitation	☐

Behavior Analysis Services

B *I* U 10pt **A**

Need additional documentation before [proceeding](#)

A. Comments / Justification:

2. From the **File** menu, select **Save Forms**.



Note

The regional behavioral analyst can use the Pending status to create a queue on **My Dashboard > Pending Assessments Queue** of BASE forms that are pending additional documentation.

Filter by Filter by Assessment = LRC Chair BASE
Status = Pending.

If additional documentation is never received, the regional behavioral analyst can use this queue to identify BASE forms that need to be closed and marked as complete.

MY DASHBOARD CONSUMERS PROVIDERS CLAIMS SCHEDULER REPORTS

CONSUMERS

Division ▼

My Enrollments ▼

Provider Selections ▼

Notes ▼

PROVIDERS

Ticklers ▼

TASKS

Links ▼

My Management ▼

Current Active Cases

Enrollments

SAN Queue

Pending Assessments Queue

Welcome, Jennifer Buck

7/3/2023 3:16 PM

Pending Assessments Queue

File

Filters

Assessment ▼ Begins With ▼ LRC Chair BASE ▼ AND ▼ ✕

Consumer Name ▼ +

Search Reset

1 Pending Assessments Queue record(s) returned - now viewing 1 through 1

Consumer Name	Case No	Assessment	Review Date ▼	Rater	Status	
Abner, Carrie	59217	LRC Chair BASE	07/03/2023	Buck, Jennifer	Pending	☐

First Previous Records per page: 15 Next Last

Behavioral Services

3. Notify the WSC that additional documentation is needed via a note in APD iConnect. This can be completed from the Note icon on the open BASE form. Select the **Note icon** at the top of the BASE form. The Note Details page displays. Update the following fields:
 - a. Cost Plan Review Note = No
 - b. Note Type = Behavioral Services
 - c. Note SubType = BASE – Additional Information Requested
 - d. Status = Pending
 - e. Recipients = WSC, behavior analysis service provider.

The screenshot displays two overlapping windows from the APD iConnect system. The background window is the 'LRC Chair BASE' form, which includes fields for 'Review' (set to 'As Needed'), 'Review Date' (07/03/2023), 'Division' (APD), and 'Approved By'. Below these are fields for 'Consumer Name' (Carrie R. Abner) and 'Review Date' (07/03/2023). The foreground window is the 'Note Details' form, which has fields for 'Division' (APD), 'Note By' (Buck, Jennifer), 'Note Date' (07/03/2023), 'Cost Plan Review Note?' (No), 'Note Type' (Behavioral Services), and 'Note SubType' (BASE - Additional Information Requested). The 'Status' is set to 'Pending'. A text area for 'Description' contains the text: 'Additional documentation needed before BASE can be completed. Notifying WSC'. Below the text area are fields for 'Status' (Pending) and 'Date Completed'. The 'Attachments' section shows 'There are no attachments to display'. The 'Recipients' section shows a table with one recipient: Buck, Jennifer, with a 'Date Sent' of 7/3/2023 and a status of 'Unread'.

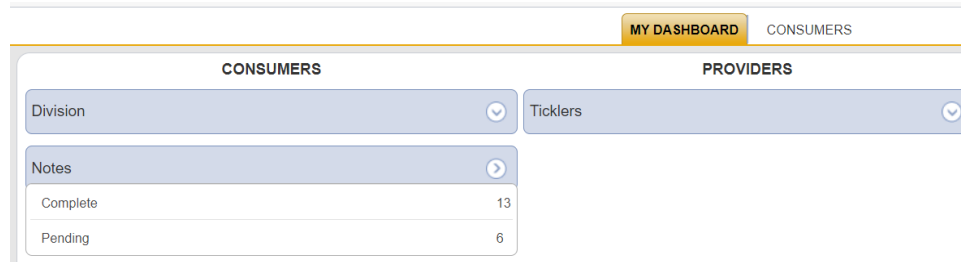
Name	Date Sent	Date Read	Status	Date Signed
Buck, Jennifer	7/3/2023		Unread	

4. From the **File** menu, select **Save and Close Notes**. The page refreshes and you are returned to the BASE form.
5. From the **File** menu, select **Save and Close Form**.

Role: WSC/CDC

6. The WSC monitors **My Dashboard > Consumers > Notes > Pending** for notification the consumer did not meet criteria for eligibility and additional documentation is needed.

Behavioral Services



MY DASHBOARD **CONSUMERS**

CONSUMERS **PROVIDERS**

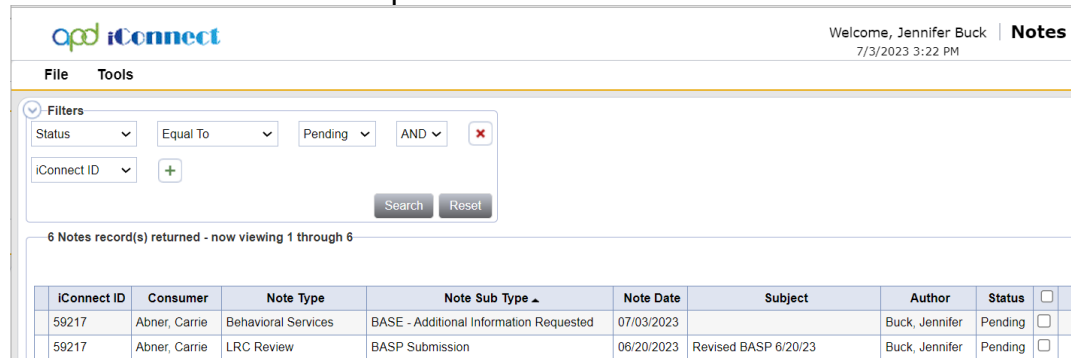
Division

Notes

Notes	
Complete	13
Pending	6

Ticklers

- The WSC will select the **Behavioral Services > BASE – Additional Information Requested** note from the list view and review the notes for the requested additional documentation.



opd iConnect Welcome, Jennifer Buck **Notes**
7/3/2023 3:22 PM

File Tools

Filters

Status Equal To Pending AND

iConnect ID

6 Notes record(s) returned - now viewing 1 through 6

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
59217	Abner, Carrie	Behavioral Services	BASE - Additional Information Requested	07/03/2023		Buck, Jennifer	Pending
59217	Abner, Carrie	LRC Review	BASP Submission	06/20/2023	Revised BASP 6/20/23	Buck, Jennifer	Pending

- The WSC will obtain additional documentation from behavior analysis service provider within 30 days and attach to the existing Behavioral Services > BASE – Additional Information Requested note. Navigate to the consumer **Notes** tab. Select the **Behavioral Services > BASE – Additional Information Requested** note in Pending status. The Note Details page displays. Update the following fields:
 - Program/Provider = enter the name of the WSC's agency
 - Notes = list the additional documentation that has been attached.
 - Status = Complete
 - Attachments = additional documentation demonstrating how the individual meets eligibility criteria
 - Recipients = regional behavioral analyst

Behavioral Services

apd iConnect Carrie Abner
Last Updated by j buck@apdcare.org
at 7/3/2023 3:20:43 PM **Notes**

File Tools

Note By *	Buck, Jennifer
Note Date *	07/03/2023
Program/Provider *	1 CARE LLC Details
Note Type *	Behavioral Services ▼
Note Sub-Type	BASE - Additional Information Requested ▼
Description	

Note

On 7/3/2023 at 3:20 PM, Jennifer Buck wrote:
Additional documentation needed before BASE can be completed. Notifying WSC

New Text

B I U 16px **A**

providing additional documentation as requested.

[Append Text to Note](#)

Status *	Complete ▼
Date Completed	07/03/2023

Attachments

[Add Attachment](#)

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient: [...](#) [Clear](#)

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	07/03/2023		Unread		Remove

- From the **File** menu, select **Save and Close Notes**. Proceed to the [BASE Completed](#) section.

Role: Service Provider, Service Provider Worker

- In addition, the behavior analysis service provider monitors **My Dashboard > Consumers > Notes** for notification the consumer did not meet criteria for eligibility and additional documentation is needed. The WSC will reach out for follow up.

3. Increase in Behavioral Services

When the need for an increase in behavioral services is identified, the WSC begins the process by submitting the request for a new BASE. The increase in behavioral services process includes the following steps:

1. WSC sends a note to the Region Clinical Workstream Lead in APD iConnect requesting a BASE to be completed.
NOTE: the BASE can be completed without a completed BASP only if there is other documentation present that shows how the individual is eligible. The BASP and/or documentation must be within the past 12 months.
2. The Region Clinical Workstream Lead will assign a regional behavioral analyst to complete the BASE.
3. The regional clinical workstream worker reviews documentation to determine whether service eligibility criteria are supported by the submitted documentation.
4. The regional behavioral analyst completes the BASE form.
5. The regional behavioral analyst informs WSC and behavior analysis service provider of eligibility via BASE request note.
6. If not eligible, the WSC works with behavior analysis service provider to update the BASP and/or submit additional documentation and resubmit.

3a. BASE Requested

Role: WSC/CDC

1. When an increase in behavioral services is identified, the WSC will request a BASE to be completed. To request a BASE, navigate to the consumers record and select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - a. Program/Provider = enter the name of the WSCs agency
 - b. Note Type = Behavioral Services
 - c. Note Subtype = BASE Request
 - d. Notes = list services and units needed, including ratios
 - e. Status = Pending
 - f. Recipient = Region Clinical Workstream Lead
 - g. Attachments = documentation needed for a med necessity review. A completed BASP or any available documentation that shows the individual meets eligibility criteria must be on file before proceeding.

Behavioral Services

qcd iConnect Carrie Abner | **Notes**
7/3/2023 3:27 PM

File Tools

Notes Details

Division *

Note By *

Note Date *

Program/Provider * [Details](#)

Note Type *

Note Sub-Type

Description

Note

B **I** **U** 16px **A**

requesting BASE. sending to ABA

Status *

Date Completed

Attachments

[Add Attachment](#)

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	7/3/2023		Unread		Remove

- From the **File** menu, select **Save and Close Notes**.

Role: Region Clinical Workstream Lead

- The Region Clinical Workstream Lead monitors **My Dashboard > Consumers > Notes > Pending** for incoming notes as notification to assign the BASE.

MY DASHBOARD		CONSUMERS
CONSUMERS		PROVIDERS
Division	Ticklers	
Notes		
Complete	13	
Pending	6	

Behavioral Services

apd iConnect Welcome, Jennifer Buck | **Notes**
7/3/2023 3:30 PM

File Tools

Filters

Status Equal To Pending AND

iConnect ID

7 Notes record(s) returned - now viewing 1 through 7

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Description	Author	Status	☐
59217	Abner, Carrie	LRC Review	BASP Submission	07/03/2023	BASP Revision 7/3/23	Buck, Jennifer	Pending	☐
59217	Abner, Carrie	Behavioral Services	BASE - Additional Information Requested	07/03/2023		Buck, Jennifer	Pending	☐
59217	Abner, Carrie	Behavioral Services	BASE Request	07/03/2023		Buck, Jennifer	Pending	☐

4. The Region Clinical Workstream Lead will assign a regional behavioral analyst to complete the BASE and notify him/her through the BASE Request note. Select the **Behavioral Services > BASE Request note**. The Note Details page displays. Update the following fields:
 - a. Note = add details about the assignment. Select Append Text to Note.
 - b. Recipient = assign the regional behavioral analyst
 - c. Status = Update to Complete

apd iConnect Carrie Abner | **Notes**
Last Updated by j.buck@apdcares.org
at 7/3/2023 3:30:21 PM

File Tools

Note By

Note Date

Program/Provider [Details](#)

Note Type

Note Sub-Type

Description

Note

On 7/3/2023 at 3:30 PM, Jennifer Buck wrote:
requesting BASE. sending to ABA

New Text

Regional Behavioral Analyst assigned

Status

Date Completed

Attachments

[Add Attachment](#)

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	07/03/2023		Unread		Remove

5. From the **File** menu, select **Save and Close Notes**.

3b. BASE Completed

Role: Region Clinical Workstream Worker

1. The regional behavioral analyst monitors **My Dashboard > Consumers > Notes > Complete** for incoming notes as notification to complete the BASE. Requests to review a revised BASE that initially did not meet criteria for eligibility are also visible in this queue.

MY DASHBOARD CONSUMERS

CONSUMERS PROVIDERS

Division Ticklers

Notes

Complete	13
Pending	6

2. The regional behavioral analyst will select the **Behavioral Services > BASE Request** note from the list view and review the attached documentation. In addition, the regional behavioral analyst will review the BASP form already saved on the consumer's record in iConnect.

apd iConnect

Welcome, Jennifer Buck | Notes
7/3/2023 3:37 PM

File Tools

Filters

Status Equal To Complete AND

iConnect ID +

Search Reset

14 Notes record(s) returned - now viewing 1 through 14

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Description	Author	Status	
59217	Abner, Carrie	Behavioral Services	BASE Completed	07/03/2023		Buck, Jennifer	Complete	☐
59217	Abner, Carrie	Behavioral Services	BASE Request	07/03/2023		Buck, Jennifer	Complete	☐

3. The regional behavioral analyst will begin the BASE form in APD iConnect. Navigate to the consumers record and select the **Forms** tab. From the **File** menu, select **Add Form**. Select the **"LRC Chair BASE"** form. The Form Details page displays. Update the following fields:
 - a. Review = select As Needed
 - b. Review Date = defaults to today
 - c. Division = defaults to APD
 - d. Worker = pre-populated with your name
 - e. Provider/Program = leave blank
 - f. Status = defaults to Draft. Will be changed to Complete later in the workflow.

Behavioral Services

opd iConnect Carrie Abner 7/3/2023 2:42 PM **Forms**

File

Please Select Type: LRC Chair BASE

Consumer Forms

Review * As Needed Worker * Buck, Jennifer Clear Details

Review Date * 07/03/2023 Status * Draft

Division * APD Provider/Program

Approved By Approved Date

ATTACHMENT E

LRC Chair Review of Behavior Analysis Services Eligibility (BASE Form)

Note: This is only a recommendation of eligibility for behavioral services, not a determination of medical necessity or an approval for the rate, hours or cost plan.

Consumer Name:

First Name Carrie

Middle Name R

Last Name Abner

Suffix

Review Date: * 07/03/2023

Support Coordinator:

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

Name	ID
Reed, Monica	2498

Search

LRC Chair or Designee: Jennifer Buck 37 characters remaining

Agency Senior Behavior Analyst: Sally Smith

Check all services for which eligibility was reviewed:

Services:

A. Behavior Analysis Services ☒

4. Complete the remaining questions in the form, saving several times along the way. It may take more than one day to complete this form.



Note

If the recommendation is intensive behavioral Residential Habilitation services, the IB Matrix must also be completed outside of APD iConnect then attached to a note in APD iConnect. This note must be added before the LRC Chair BASE form is saved in Complete status.

1. Select the **Note Icon** at the top of the BASE form.
 2. The Note Details page displays. Update the following fields:
 - a. Cost Plan Review Note = No
 - b. Note Type = Behavioral Services
 - c. Note Subtype = BASE Completed
 - d. Description = IB Matrix
 - e. Status = Complete
 - f. Attachments = IB Matrix
 - g. Recipient = None
 3. From the **File** menu, select **Save and Close Notes**. The page refreshes and you are returned to the LRC Chair BASE form
5. Once the review is complete, the regional behavioral analyst will determine if the criteria has met for behavioral services eligibility. Two possible outcomes exist:
 1. [Consumer meets criteria for behavioral services](#) increase

Behavioral Services

2. [Consumer does not meet criteria for behavioral services increase.](#)
3. [Consumer meets criteria for eligibility with a decrease in services.](#)

3bi. Consumer Meets Criteria for Behavioral Services Increase

Role: Region Clinical Workstream Worker

1. The regional behavioral analyst will add the recommendation on the BASE form. If the BASE form is not already open, navigate to the consumer's **Forms** tab. Select the **LRC Chair BASE** form from the list. Update the following fields:
 - a. Comments/Justification = enter justification for the behavioral services
 - b. Units for the Review Period = enter units
 - c. Fading Schedule = enter details if applicable
 - d. Eligibility = Eligible
 - e. Eligibility/Ineligibility Comments = add additional details if needed
 - f. Next Review Date = enter date of next review
 - g. LRC Chair or Designee = enter the name of the LRC Chair. This serves as the signature.
 - h. Status = Update to Complete

A. Units for the Review Period:	35
A. Fading Schedule:	fading schedule details
A. Eligibility	
☒ Eligible ☐ Ineligible	
A. Eligibility/Ineligibility Comments	eligibility comments
A. Next Review Date:	07/01/2024 
A. LRC Chair or Designee*:	Jennifer Buck, BCBA

2. From the **File** menu, select **Save Forms**, NOT Save and Close Forms.
3. From the open BASE form, the regional behavioral analyst will generate the BASE Word Merge. From the **Word Merge** menu, select the **LRC Chair BASE** word merge.

Behavioral Services

Consumer Forms

Review * Worker * Clear Details

Review Date * Status *

Division * Provider/Program

Approved By Approved Date

Note

ATTACHMENT E

LRC Chair Review of Behavior Analysis Services Eligibility (BASE Form)

Note: This is only a recommendation of eligibility for behavioral services, not a determination of medical necessity or an approval for the rate, hours or cost plan.

Consumer Name:

First Name

Middle Name

Last Name

- The Word Merge preview window displays. Select **Save to Note**.

Preview (read-only)
This is a preview of your merge document and is not editable.

Generate Merge Document
Click the "Open Document" button to open the Merge Document for editing.

Save to Note
If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.

Upload and Save to Note
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.

LRC Chair Review of Behavior Analysis Services Eligibility

Recipient:	Carrie Abner	Review Date:	07/03/2023
Support Coordinator:	Monica Reed	LRC Chair or Designee:	Jennifer Buck

Reviewed Services

Behavior Services:

☒ Behavior Analysis

☒ Behavior Assistant

Life Skills Development 3 (ADT):

☐ 1:5 Ratio

☐ 1:3 Ratio

☐ 1:1 Ratio

Life Skills Development 4 (Pre-Voc):

☐ 1:5 Ratio

☐ 1:3 Ratio

- A notification message displays confirming the LRC Chair BASE Word Merge was saved to a note. Click **Okay**.

Itssbh1.mediware.com says

Document was successfully saved to Note with NoteID=1372897.

Behavioral Services

6. The Note Details page displays. Notify the WSC that the consumer meets criteria for behavioral services eligibility. Update the following fields:
 - a. Division = select APD
 - b. Note Type = Update to Behavioral Services
 - c. Note SubType = BASE Completed
 - d. Description = defaults to Word Merge Template. Update if desired.
 - e. Note = optional
 - f. Status = Complete
 - g. Attachment = signed BASE
 - h. Recipients = WSC, behavior analysis service provider, Region Clinical Workstream Lead

The screenshot shows the 'iConnect' application interface. At the top, the 'Notes' section is active. The 'Notes Details' form is displayed with the following fields:

- Division: APD (dropdown)
- Note By: Buck, Jennifer (text)
- Note Date: 07/21/2023 (calendar icon)
- Program/Provider: (empty dropdown)
- Note Type: Behavioral Services (dropdown)
- Note Sub-Type: BASE Completed (dropdown)
- Description: Word Merge Template (text area)

Below the description is a large text area for the note content. To the right of this area is a 'New Text' editor with a toolbar (Bold, Italic, Underline, 16px font size, color picker) and a scrollable text input. Below the text input is a button labeled 'Append Text to Note'.

At the bottom of the form, there are fields for:

- Status: Complete (dropdown)
- Date Completed: 07/21/2023 (text)

7. From the **File** menu, select **Save and Close Notes**.
8. For more detailed general Word Merge instruction, see the [As Needed: Word Merges](#) section.

Role: WSC/CDC

Behavioral Services

9. The WSC monitors **My Dashboard > Consumers > Notes** for notification the BASE was completed. The WSC may need to create more authorizations following the current cost plan processes.

Role: Service Provider, Service Provider Worker

10. The behavior analysis service provider monitors **My Dashboard > Consumers > Notes** for notification the BASE was completed as notification only.

Role: Region Clinical Workstream Lead

11. The Region Clinical Workstream Lead monitors **My Dashboard > Consumers > Notes** for notification the BASE was completed as notification only.

3bii. Consumer Does Not Meet Criteria for Behavioral Services Increase. Additional Documentation Required.

Role: Region Clinical Workstream Worker

1. The regional behavioral analyst will update the BASE form. If the BASE form is not already open, navigate to the consumer's **Forms** tab. Select the **LRC Chair BASE** form from the list. Update the following fields:
 - a. Comments/Justification = enter comments about the missing documentation.
 - b. Status = Pending

 Carrie Abner | **Forms**
Last Updated by jrbuck@apdcares.org at 7/3/2023 2:53:02 PM

File Reports Word Merge

LRC Chair BASE

Consumer Forms

Review *	As Needed ▼	Worker *	Buck, Jennifer	Clear	Details
Review Date *	07/03/2023	Status *	Pending ▼		
Division *	APD ▼	Provider/Program	▼		
Approved By					
Approved Date					
Note					

ATTACHMENT E

LRC Chair Review of Behavior Analysis Services Eligibility (BASE Form)

Note: This is only a recommendation of eligibility for behavioral services, not a determination of medical necessity or an approval for the rate, hours or cost plan.

Consumer Name:

First Name	Carrie
Middle Name	R
Last Name	Abner

Behavioral Services

Check all services for which eligibility was reviewed:

Service(s):	
A. Behavior Analysis Services	☒
B. Behavior Assistant Services	☒
C. Life Skills Development 3 (ADT)	☐
D. Life Skills Development 4 (Pre-Voc)	☐
E. Residential Habilitation	☐

Behavior Analysis Services

A. Comments / Justification:

B *I* U 10pt A ▾

Need additional documentation before [proceeding](#)

2. From the **File** menu, select **Save Forms**.



Note

The regional behavioral analyst can use the Pending status to create a queue on **My Dashboard > Pending Assessments Queue** of BASE forms that are pending additional documentation.

Filter by Filter by Assessment = LRC Chair BASE
Status = Pending.

If additional documentation is never received, the regional behavioral analyst can use this queue to identify BASE forms that need to be closed and marked as complete.

MY DASHBOARD
CONSUMERS
PROVIDERS
CLAIMS
SCHEDULER
REPORTS

CONSUMERS

Division ▾

My Enrollments ▾

Provider Selections ▾

Notes ▾

PROVIDERS

Ticklers ▾

TASKS

Links ▾

My Management ▾

- Current Active Cases
- Enrollments
- SAN Queue
- Pending Assessments Queue

Welcome, Jennifer Buck
7/3/2023 3:16 PM

Pending Assessments Queue

File

Filters

Assessment ▾
Consumer Name ▾

Begins With ▾

LRC Chair BASE

AND ▾

+

X

Search Reset

1 Pending Assessments Queue record(s) returned - now viewing 1 through 1

Consumer Name	Case No	Assessment	Review Date ▾	Rater	Status	
Abner, Carrie	59217	LRC Chair BASE	07/03/2023	Buck, Jennifer	Pending	☐

First Previous
Records per page: 15
Next Last

Behavioral Services

3. Notify the WSC that additional documentation is needed via a note in APD iConnect. This can be completed from the Note icon on the open BASE form. Select the **Note icon** at the top of the BASE form. The Note Details page displays. Update the following fields:
 - a. Cost Plan Review Note = No
 - b. Note Type = Behavioral Services
 - c. Note SubType = BASE – Additional Information Requested
 - d. Status = Pending
 - e. Recipients = WSC, behavior analysis service provider. Both will be monitoring their dashboards working concurrently to get all requested documentation.

The screenshot displays two overlapping web forms from the APD iConnect system. The background form is the 'LRC Chair Review' form, which includes fields for Consumer Name (Carrie), Review Date (07/03/2023), Division (APD), and a list of services reviewed (Behavior Analysis Services and Behavior Assistant Services, both checked). The foreground form is the 'Notes' form, which is used to add a note to the review. It includes fields for Division (APD), Note By (Buck, Jennifer), Note Date (07/03/2023), Cost Plan Review Note? (No), Note Type (Behavioral Services), Note SubType (BASE - Additional Information Requested), and Status (Pending). A text area for the note contains the text: 'Additional documentation needed before BASE can be completed. Notifying WSC'. Below the note field is a table for Attachments, which is currently empty. At the bottom, there is a 'Recipients' section with a table showing the recipient Buck, Jennifer, with a date sent of 7/3/2023 and a status of Unread.

Name	Date Sent	Date Read	Status	Date Signed
Buck, Jennifer	7/3/2023		Unread	

4. From the **File** menu, select **Save and Close Notes**. The page refreshes and you are returned to the BASE form.
5. From the **File** menu, select **Save and Close Form**.

Role: WSC/CDC

6. The WSC monitors **My Dashboard > Consumers > Notes > Pending** for notification the consumer did not meet criteria for an increase and additional documentation is needed.

Behavioral Services

The screenshot shows a web interface with two main sections: **CONSUMERS** and **PROVIDERS**. Under **CONSUMERS**, there is a **Division** dropdown menu and a **Notes** section with a table. The **Notes** table has two rows: **Complete** with a count of 13, and **Pending** with a count of 6. Under **PROVIDERS**, there is a **Ticklers** dropdown menu.

7. The WSC will select the **Behavioral Services > BASE – Additional Information** note from the list view and review the notes for the requested additional documentation.

The screenshot shows the **iConnect** interface. At the top, there is a header with the **iConnect** logo, a welcome message "Welcome, Jennifer Buck", and a "Notes" tab. Below the header, there is a "File" and "Tools" section. A "Filters" section is visible, showing a search filter for "Status" set to "Pending" and "AND". Below the filters, a message states "6 Notes record(s) returned - now viewing 1 through 6". A table of notes is displayed below the message.

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status	
59217	Abner, Carrie	Behavioral Services	BASE - Additional Information Requested	07/03/2023		Buck, Jennifer	Pending	☐
59217	Abner, Carrie	LRC Review	BASP Submission	06/20/2023	Revised BASP 6/20/23	Buck, Jennifer	Pending	☐

8. The WSC will obtain additional documentation from behavior analysis service provider within 30 days and attach to the existing Behavioral Services > BASE – Additional Information Requested note. Navigate to the consumer **Notes** tab. Select the **Behavioral Services > BASE – Additional Information Requested** note in Pending status. The Note Details page displays. Update the following fields:
- Program/Provider = enter the name of the WSC's agency
 - Notes = list the additional documentation that has been attached.
 - Status = Complete
 - Attachments = additional documentation demonstrating how the individual meets eligibility criteria
 - Recipients = regional behavioral analyst

Behavioral Services

File Tools

Note By * Buck, Jennifer

Note Date * 07/03/2023

Program/Provider * 1 CARE LLC [Details](#)

Note Type * Behavioral Services

Note Sub-Type BASE - Additional Information Requested

Description

On 7/3/2023 at 3:20 PM, Jennifer Buck wrote:
Additional documentation needed before BASE can be completed. Notifying WSC

Note

New Text

B I U 16px **A**

providing additional documentation as requested.

Append Text to Note

Status * Complete

Date Completed 07/03/2023

Attachments

[Add Attachment](#)

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient: [...](#) [Clear](#)

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	07/03/2023		Unread		Remove

9. From the **File** menu, select **Save and Close Notes**. Proceed to the [BASE Completed](#) section

Role: Service Provider, Service Provider Worker

10. In addition, the behavior analysis service provider monitors **My Dashboard > Consumers > Notes** for notification the consumer did not meet criteria for an increase and additional documentation is needed. The WSC will reach out for follow up.

3biii. Consumer Meets Criteria for Eligibility with a Decrease in Services

Role: Region Clinical Workstream Worker

1. The regional behavioral analyst will add the recommendation on the BASE form. If the BASE form is not already open, navigate

Behavioral Services

to the consumer's **Forms** tab. Select the **LRC Chair BASE** form from the list. Update the following fields:

- a. Comments/Justification = enter justification for the behavioral services
- b. Units for the Review Period = enter units
- c. Fading Schedule = enter details if applicable
- d. Eligibility = Eligible
- e. Eligibility/Ineligibility Comments = add additional details if needed
- f. Next Review Date = enter date of next review
- g. LRC Chair or Designee = enter the name of the LRC Chair. This serves as the signature.
- h. Status = Update to Complete

A. Units for the Review Period:	35
A. Fading Schedule:	fading schedule details
A. Eligibility	
☒ Eligible ☐ Ineligible	
A. Eligibility/Ineligibility Comments	eligibility comments
A. Next Review Date:	07/01/2024 
A. LRC Chair or Designee*:	Jennifer Buck, BCBA

2. From the **File** menu, select **Save Forms**, NOT Save and Close Forms.
3. From the open BASE form, the regional behavioral analyst will generate the BASE Word Merge. From the **Word Merge** menu, select the **LRC Chair BASE** word merge.

Behavioral Services

apd iConnect Carrie Abner
Last Updated by jbuck@apdcares.org at 7/18/2023 3:53:46 PM **Forms**

File Reports Word Merge

LRC Chair BASE LRC Chair BASE

Consumer Forms

Review *	Initial	Worker *	Buck, Jennifer	Details
Review Date *	07/18/2023	Status *	Complete	
Division *	APD	Provider/Program		
Approved By	Buck, Jennifer	Approved Date	07/18/2023	Details
Note				

ATTACHMENT E

LRC Chair Review of Behavior Analysis Services Eligibility (BASE Form)

Note: This is only a recommendation of eligibility for behavioral services, not a determination of medical necessity or a approval for the rate, hours or cost plan.

4. The Word Merge preview window displays. Select **Save to Note**.

apd iConnect Carrie Abner
7/3/2023 2:54 PM **LRC Chair BASE**

File

Preview (read-only)
This is a preview of your merge document and is not editable.

Generate Merge Document
Click the "Open Document" button to open the Merge Document for editing.
[Open Document](#)

Save to Note
If no changes have been made to the Merge Document, click "Save to Note". The current word merge template will be uploaded to a note record with the merge fields populated.
[Save to Note](#)

Upload and Save to Note
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.
[Upload and Save to Note](#)

LRC Chair Review of Behavior Analysis Services Eligibility

Recipient:	Carrie Abner	Review Date:	07/03/2023
Support Coordinator:	Monica Reed	LRC Chair or Designee:	Jennifer Buck

Reviewed Services

Behavior Services:

- ☒ Behavior Analysis
- ☒ Behavior Assistant

Life Skills Development 3 (ADT):

- ☐ 1:5 Ratio
- ☐ 1:3 Ratio
- ☐ 1:1 Ratio

Life Skills Development 4 (Pre-Voc):

- ☐ 1:5 Ratio
- ☐ 1:3 Ratio

5. A notification message displays confirming the LRC Chair BASE Word Merge was saved to a note. Click **Okay**.

Behavioral Services

Itssbh1.mediware.com says

Document was successfully saved to Note with NoteID=1372897.

OK

6. The Note Details page displays. Notify the WSC that the consumer meets criteria for behavioral services eligibility. Update the following fields:
 - a. Division = select APD
 - b. Note Type = Update to Behavioral Services
 - c. Note SubType = BASE Completed
 - d. Description = defaults to Word Merge Template. Update if desired.
 - e. Note = optional
 - f. Status = Complete
 - g. Attachment = signed BASE
 - h. Recipients = WSC, behavior analysis service provider, Region Waiver Workstream Worker, Region Clinical Workstream Lead

Carrie Abner
 Last Updated by j buck@apdcares.org
 at 7/21/2023 10:42:03 AM

Notes

Notes

Notes Details

Division *	APD
Note By *	Buck, Jennifer
Note Date *	07/21/2023
Program/Provider	
Note Type *	Behavioral Services ▾
Note Sub-Type	BASE Completed ▾
Description	Word Merge Template

Note

New Text

B *I* U 16px **A** ▾

Append Text to Note

Status *	Complete ▾
Date Completed	07/21/2023

7. From the **File** menu, select **Save and Close Notes**.

Behavioral Services

- For more detailed general Word Merge instruction, see the [As Needed: Word Merges](#) section.

Role: WSC/CDC

- The WSC monitors **My Dashboard > Consumers > Notes > Complete** for notification the BASE was completed and a decrease in services is needed. The WSC will work with the Region Waiver Workstream Worker to determine how the services will be reduced. The WSC will go through the cost plan review process to adjust the services.

13 Notes record(s) returned - now viewing 1 through 13

IConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
59217	Abner, Carrie	Behavioral Services	BASE Completed	07/03/2023		Buck, Jennifer	Complete
59217	Abner, Carrie	Behavioral Services	BASE Request	07/03/2023		Buck, Jennifer	Complete

Role: Regional Waiver Workstream Worker

- The Region Waiver Workstream Worker monitors **My Dashboard > Consumers > Notes > Complete** for notification the BASE was completed, and services will be reduced.

Role: Service Provider

- The behavior analysis service provider monitors **My Dashboard > Consumers > Notes > Complete** for notification the BASE was completed with a decrease in services as notification only.

4. Completion of Behavior Analysis Service Quarterly Report (BASQR) Process

The BASQR completion process includes the following steps:

1. The behavior analysis service provider has added data to their data system to produce behavior analysis graphs and data tables for the consumer.
2. The behavior analysis service provider completes the Quarterly Summary behavior analysis service provider documentation requirement.
3. The behavior analysis service provider completes the BASQR form in APD iConnect, pulling data from the BASP and attaching graphs and tables into the form via a note.
4. The behavior analysis service provider notifies the WSC the BASQR has been completed via a note in APD iConnect.
5. Copy Shared Response and Duplicate Assessment functionality can be used to make this process more efficient.
 - a. The first BASQR must pull from BASP.
 - b. All subsequent BASQRs must pull from the previous BASQR, unless:
 - c. A BASP update has occurred since the previous BASQR was written.

1st Quarter BASQR

Role: Service Provider, Service Provider Worker

1. The behavior analysis service provider enters behavior analysis assessment data into the data system outside of APD iConnect. The data systems for the behavior analysis service providers will produce the graphs and tables of data for the consumers. These graphs and tables will be saved as PDF documents and attached to a note from the BASQR form in APD iConnect.
2. Quarterly, the behavior analysis service provider will complete the BASQR form in APD iConnect. Navigate to the consumers record and select the **Forms** tab. From the **File** menu, select **Add Form**. The Form Details page displays. Select **Behavior Analysis Service Quarterly Report (BASQR)** from the list. Update the following fields:
 - a. Review = select Quarterly
 - b. Review Date = defaults to today
 - c. Division = defaults to APD
 - d. Worker = pre-populated with your name
 - e. Status = defaults to Draft. It will be changed to Complete later in the workflow.

Behavioral Services

- f. Provider/Program = enter the behavior analysis service provider's agency
3. For the 1st quarter BASQR, copy the responses to the maladaptive behaviors and replacement behavior questions from the BASP to the BASQR. From the **File** menu, select **Copy Shared Response**.

The screenshot shows the iConnect web application. At the top, the logo 'iConnect' is on the left, and 'Carrie Abner 7/3/2023 3:51 PM' and 'Forms' are on the right. A 'File' menu is open on the left, with 'Copy Shared Response' highlighted. The main form is titled 'Behavior Analysis Service Quarterly Report (BASQR)'. It has a dropdown menu for 'Service Quarterly Report (BASQR)' and a 'Details' link. Below this, there are fields for 'Worker' (Buck, Jennifer), 'Status' (Draft), 'Provider/Program' (ABA SOLUTIONS, INC.), and 'Approved Date'. A blue bar at the bottom of the form reads 'Behavior Analysis Service Quarterly Report'.

4. Select the most recent **Behavior Analysis Services Plan** from the list. The page refreshes and you are returned to the BASQR form. The responses for the maladaptive and replacement behavior questions from the BASP will be populated on the BASQR.

The screenshot shows the iConnect web application. At the top, the logo 'iConnect' is on the left, and 'Carrie Abner 7/3/2023 3:59 PM' and 'Assessments with Shared Responses' are on the right. A 'File' menu is open on the left. Below the menu, there is a 'Filters' section with 'Search' and 'Reset' buttons. A message states '8 Assessments with Shared Responses record(s) returned - now viewing 1 through 8'. Below this is a table with the following data:

Form Name	Review	Review Date	Rater
Functional Behavioral Assessment	As Needed	07/03/2023	Buck, Jennifer
Behavior Analysis Services Plan	Initial	07/03/2023	Buck, Jennifer

Behavioral Services



Note

All 15 Maladaptive Behavior and Replacement Behavior questions are exposed by default. After using Copy Shared Response, some may still be blank (e.g. if only 12 of the 15 behavior questions were answered, 3 will be blank.) The behavior analysis service provider can keep these blank fields exposed and just scroll down to the next applicable question or use the “Hide Maladaptive Behavior....” and “Hide Replacement Behavior....” Questions to hide the blank questions on the form.

Hide Maladaptive Behavior 4?	☒ Yes ☐ No
Hide Maladaptive Behavior 5?	☐ Yes ☐ No
Maladaptive Behavior 5. Target Topography:	
Maladaptive Behavior 5. Target Definition:	1000 characters remaining
Maladaptive Behavior 5. Baseline Start Date:	
Maladaptive Behavior 5. Baseline End Date:	
Maladaptive Behavior 5. Average Baseline Number:	
Maladaptive Behavior 5. Type of Measure:	

5. Complete the remaining questions in the form including the **Plan or Recommendation for the Next Quarter**.

Plan or Recommendation for Next Quarter	
Based on data analysis and review, what are the recommended actions for next quarter?*	Continue Program Revise Program Discuss With LRC Chair Fade Behavior Analyst Fade Behavior Assistant Discontinue Program Refer for Medical or Other Consultation
Please provide additional information regarding selections above (required for consultations or if you selected Other)	B I U 16px A

6. From the **File** menu, select **Save Form**.
7. Graphs must also be added to the BASQR form. This is done from the **Note icon** in the header of the form.



Note

The form must be saved, at least one, to display the Note icon. Save the form by selecting the **File** menu, then select **Save Form**.

8. Click the **Note icon**. The Note Details page displays. Update the following fields:
 - a. Cost Plan Review Note = No
 - b. Note Type = Behavioral Services
 - c. Note Sub Type = BASQR
 - d. Description = Type of graph + time period it covers (e.g. BASQR May – June 2023)
 - e. Notes = any additional details about the attached graphs
 - f. Status = Complete
 - g. Attachment = search for and select the document saved on your device.
 - i. Description = Once the document is selected, within the attachment window, add a Description of the attachment as sometimes the file name is cryptic and not easy to identify what the attachment contains.

9. From the **File** menu, select **Save and Close Notes**.

Behavioral Services

The screenshot displays the APD iConnect interface. On the left, the 'Behavior Analysis Service Quarterly' form is visible, showing fields for Review (Quarterly), Review Date (07/19/2023), Division (APD), and Approved By. Below this, there's a section for 'Behavioral Services' with fields for Provider's Name, Provider's Credentials, and Supervisor's Name. On the right, the 'Notes' tab is active, showing a form for adding a new note. The note fields include Division (APD), Note By (Buck, Jennifer), Note Date (07/21/2023), Cost Plan Review Note? (No), Note Type (Behavioral Services), Note Sub Type (BASQR), and Description (BASQR May - June 2023). The note content area contains the text 'BASQR graphs attached'. The Status is set to Complete, and the Date Completed is 07/21/2023.

10. The page refreshes and you're returned to the BASQR form.
11. Once all questions are answered and graphs attached as a Note, change the status of the form to **Complete**.
12. From the **File** menu, select **Save and Close Form**.
13. The behavior analysis service provider notifies the WSC when the BASQR is complete through a note in APD iConnect. Navigate to the consumer's **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
 - a. Program/Provider = enter the name of the behavior analysis service provider's agency
 - b. Note Type = Behavioral Services
 - c. Note Sub Type = BASQR Completed
 - d. Description = Quarter #
 - e. Notes = any additional details as needed
 - f. Status = Complete
 - g. Note Recipient = WSC

Behavioral Services

Notes Details

Division *

Note By *

Note Date *

Program/Provider * [Details](#)

Note Type *

Note Sub-Type *

Description

Note

B **I** **U** 16px **A**

BASQR completed and graphs attached

Status *

Date Completed

Attachments

[Add Attachment](#)

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

[Add Note Recipient](#)

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	7/3/2023		Unread		Remove

14. From the **File** menu, select **Save and Close Notes**.

15. The behavior analysis service provider also adds a quarterly Provider Documentation record. Navigate to the consumers record and click the **Provider Documentation** tab > click **File > Add Provider Documentation**. Enter the documentation record according to current processes.

Role: WSC/CDC

16. The WSC monitors **My Dashboard > Consumers > Notes > Complete** for notification the BASQR was completed. The WSC reviews the **Behavioral Services > BASQR Completed note & BASQR form** as part of routine monitoring of services for the individual.

2nd Quarter BASQR

Role: Service Provider, Service Provider Worker

1. This process is repeated quarterly. For the second quarter, use the **Duplicate Assessment** feature. This will copy the responses from the 1st quarter BASQR to a new version of the

Behavioral Services

form, which will be updated for the 2nd quarter BASQR. From the consumer's **Forms tab**, select the completed **BASQR form** from the 1st quarter. From the **File** menu, select **Duplicate Assessment**.

The screenshot shows the iConnect web application interface. At the top, the logo 'iConnect' is on the left, and user information 'Carrie Abner' and a 'Forms' button are on the right. Below the header, a 'File' menu is open, highlighting the 'Duplicate Assessment' option. The main content area displays a 'Quarterly Report (BASQR)' form. Fields include 'Worker' (Buck, Jennifer), 'Status' (Complete), 'Provider/Program' (ABA SOLUTIONS, INC.), 'Approved By' (Buck, Jennifer), and 'Approved Date' (07/19/2023). Below the form, a section titled 'Behavior Analysis Service Quarterly Report' contains 'Summary Period (Quarter by Support plan):' (2nd Quarter) and 'Date of current Behavior Plan' (07/03/2023). At the bottom, a green bar indicates 'Behavior Analysis Service Provider Information'.

2. The page refreshes and a new BASQR form displays. Update the following fields:
 - a. Summary Period = 2nd Quarter
 - b. Update or inactivate Maladaptive Behaviors as applicable
 - c. Update or inactivate Replacement Behaviors as applicable
 - d. Update any additional fields to represent the consumer's status this quarter.
 - e. Update the Plan of Recommendation for Next Quarter section.
3. From the **File** menu, select **Save Form**.
4. Graphs must also be added to the BASQR form before it can be completed and the WSC must be notified of the BASQR form completion. Repeat steps 7 – 16 in the [1st Quarter BASQR section](#).

3rd Quarter BASQR

Role: Service Provider, Service Provider Worker

1. For the 3rd quarter/annual, use the **Duplicate Assessment** feature again. This will copy the responses from the 2nd quarter BASQR to a new version of the form, which will be updated for the 3rd quarter/annual BASQR. From the consumer's **Forms tab**, select the completed **BASQR form** from the 2nd quarter.

Behavioral Services

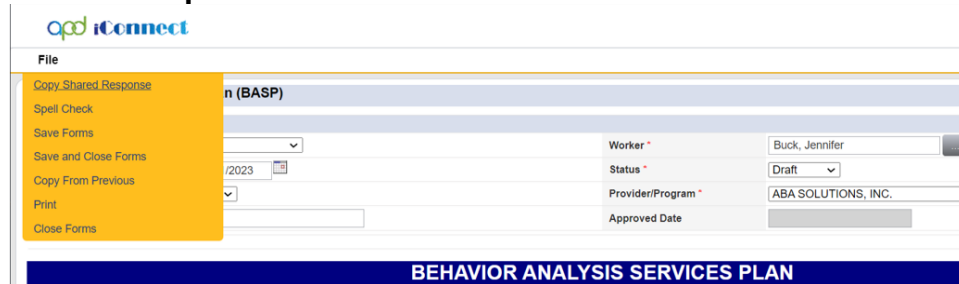
From the **File** menu, select **Duplicate Assessment**.

The screenshot shows the 'apd iConnect' web application interface. At the top right, it says 'Carrie Abner' and 'Last Updated by jrbuck@apdcares.org at 7/19/2023 11:26:53 AM'. There is a 'Forms' button. A 'File' menu is open, showing options: 'History', 'Duplicate Assessment' (highlighted in orange), 'Reverse Status', 'Print', and 'Close Forms'. The main content area shows a 'Quarterly Report (BASQR)' form. Fields include 'Worker' (Buck, Jennifer), 'Status' (Complete), 'Provider/Program' (ABA SOLUTIONS, INC.), 'Approved By' (Buck, Jennifer), and 'Approved Date' (07/19/2023). Below this is a section titled 'Behavior Analysis Service Quarterly Report' with 'Summary Period (Quarter by Support plan):' set to '2nd Quarter' and 'Date of current Behavior Plan' set to '07/03/2023'. At the bottom is a green bar labeled 'Behavior Analysis Service Provider Information'.

2. The page refreshes and a new BASQR form displays. Update the following fields:
 - a. Summary Period = 3rd Quarter
 - b. Update or inactivate Maladaptive Behaviors as applicable
 - c. Update or inactivate Replacement Behaviors as applicable
 - d. Update any additional fields to represent the consumer's status this quarter.
 - e. Update the Plan of Recommendation for Next Quarter section.
3. From the **File** menu, select **Save Form**.
4. Graphs must also be added to the BASQR form before it can be completed and the WSC must be notified of the BASQR form completion. Repeat steps 7 – 16 in the [1st Quarter BASQR section](#).
5. During the 3rd quarter/annual BASQR, a new BASP must also be completed. Use the Duplicate Assessment and Copy Shared Response functionality to create the new BASP. From the consumer's **Forms tab**, select the most recent **BASP form**.
6. From the **File** menu, select **Duplicate Assessment**. The page refreshes and a new BASP form displays. Update the following fields in the header:
 - a. Review = Update to Annual
 - b. Review Date = defaults to today
 - c. Provider/Program = defaults to the behavior analysis service provider

Behavioral Services

- From the **File** menu, select **Save Form**.
- Now update this new BASP form with the most recent Maladaptive and Replacement Behavior updates from the 3rd Quarter BASQR using the Copy Shared Response feature. From the open BASP form, from the **File** menu, select **Copy Shared Response**.



The screenshot shows the iConnect application interface. A 'File' menu is open, displaying options: 'Copy Shared Response', 'Spell Check', 'Save Forms', 'Save and Close Forms', 'Copy From Previous', 'Print', and 'Close Forms'. The 'Copy Shared Response' option is highlighted in orange. In the background, a form titled 'Behavior Analysis Services Plan' is visible, showing fields for 'Worker' (Buck, Jennifer), 'Status' (Draft), 'Provider/Program' (ABA SOLUTIONS, INC.), and 'Approved Date'.

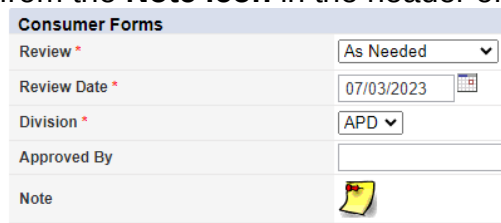
- Select the most recent 3rd quarter BASQR form from the Assessments with Shared Responses list.



The screenshot shows the iConnect application interface. The top right corner displays 'Carrie Abner' and '7/21/2023 2:20 PM'. The main heading is 'Assessments with Shared Responses'. Below this, there is a 'File' menu and a 'Filters' section with 'Search' and 'Reset' buttons. A message states: '17 Assessments with Shared Responses record(s) returned - now viewing 1 through 15'. A table lists the assessments:

Form Name	Review	Review Date	Rater
Behavior Analysis Service Quarterly Report (BASQR)	Quarterly	07/19/2023	Buck, Jennifer
Behavior Analysis Service Quarterly Report (BASQR)	Quarterly	07/19/2023	Buck, Jennifer
Behavior Analysis Services Plan	Initial	07/03/2023	Buck, Jennifer

- The page refreshes and you are returned to the BASP. The Maladaptive and Replacement Behavior responses from the 3rd Quarter BASQR have updated the Maladaptive and Replacement Behavior responses on this year's BASP. Update the remaining fields in the form as applicable. For example:
 - Plan Type = change to Update with revision(s)
 - Date of Plan = update the date
- Graphs must also be added to the BASP form. This is done from the **Note icon** in the header of the form.



The screenshot shows the 'Consumer Forms' section of the BASP form. It includes fields for 'Review' (As Needed), 'Review Date' (07/03/2023), 'Division' (APD), 'Approved By', and a 'Note' field with a yellow sticky note icon.



Note

The form must be saved, at least one, to display the Note icon. Save the form by selecting the **File** menu, then select **Save Form**.

12. Click the **Note icon**. The Note Details page displays. Update the following fields:
- a. Cost Plan Review Note = No
 - b. Note Type = Behavioral Services
 - c. Note Sub Type = BASP
 - d. Description = Type of graph + time period it covers (e.g. BASP graph May – June 2024)
 - e. Notes = any additional details about the attached graphs
 - f. Status = Complete
 - g. Attachment = search for and select the document saved on your device.
 - i. Description = Once the document is selected, within the attachment window, add a Description of the attachment as sometimes the file name is cryptic and not easy to identify what the attachment contains.

The screenshot shows a web form for adding a note. It includes the following fields and options:

- File:** A text box containing '20220901_APDF...g-Guide-V1.docx' with a 'Choose File' button to its left.
- File Name:** Two radio button options: 'from uploaded file' (which is selected) and 'create new'. The 'create new' option is followed by an empty text input field.
- Description:** A text box containing 'Target behavior 1 graph'.
- Category:** A dropdown menu with a downward arrow.
- Buttons:** Two buttons at the bottom: 'Upload' and 'Upload and Add Another'.
- Note:** A red text line at the bottom states: 'Note: Maximum size for attachment is set to 18.46 MBytes.'



Note

iConnect is an encrypted system and providers should not password protect documents when uploading into the system. Password protecting them results in APD not being able to open the documents and then the provider will need to be contacted and asked to resubmit the documentation.

Behavioral Services

The screenshot shows the iConnect web application interface. At the top, the iConnect logo is on the left, and the user name 'Carrie Abner' and 'Last Updated by jibuck@apdcares.org at 7/3/2023 12:38:40 PM' are on the right. Below the header is a 'File' menu. The main section is titled 'Behavior Analysis Services Plan'. Under 'Consumer Forms', there are fields for 'Review' (Initial), 'Review Date' (07/03/2023), 'Division' (APD), 'Worker' (Buck, Jennifer), 'Status' (Draft), and 'Provider/Program' (ABA SOLUTIONS, INC.). A 'Note' field is also present. On the left side, there are sections for 'Plan type:', 'Date of Plan:', 'Consumer's First Name:', 'Consumer's Last Name:', 'Author' (Name and Credentials), and checkboxes for 'Do you need to add a second Author?' and 'Do you need to add a Supervisor?'. A green bar contains the text 'In each of the remaining sub-sections, please the item.' Below this is a 'Medical Rule-Out Status:' section. A modal window titled 'Notes' is open in the foreground. It contains fields for 'Division' (APD), 'Note By' (Buck, Jennifer), 'Note Date' (07/03/2023), 'Cost Plan Review Note?' (No), 'Note Type' (Behavioral Services), 'Note SubType' (BASP), and a 'Description' field with the text 'BASP Graph May - June 2023'. There is a rich text editor with 'BASP Graphs attached' and a 'Note' field. At the bottom of the modal, there are 'Status' (Complete) and 'Date Completed' (07/03/2023) fields.

13. From the **File** menu, select **Save and Close Notes**.
14. The page refreshes and you're returned to the BASP form.
15. Once all questions are answered and graphs attached as a Note, change the status of the form to Complete.
16. From the **File** menu, select **Save and Close Form**.
17. Proceed to the [BASP Completion section](#).

5. Report Use of Reactive Strategies

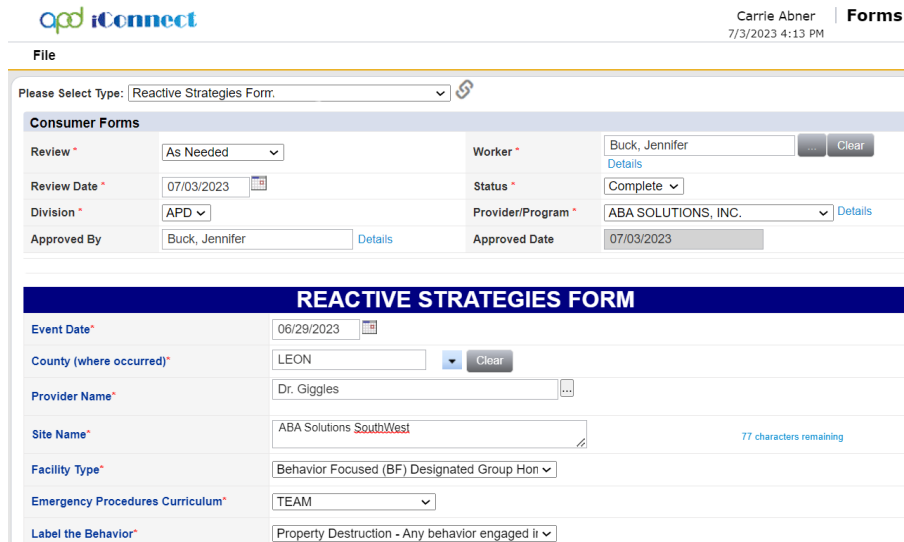
Any provider who uses reactive strategies is required to complete the Reactive Strategies Form in APD iConnect. Reporting the use of Reactive Strategies includes the following steps:

1. The behavioral provider uses one or more reactive strategies during a single event.
2. The behavioral provider completes the Reactive Strategies form in APD iConnect.
3. The regional senior behavior analyst or
4. designee runs a report to identify events that require follow up.

Role: Service Provider, Service Provider Worker

1. The behavioral provider uses one or more reactive strategies during a single event.
2. The behavioral provider will complete the Reactive Strategies form in APD iConnect. Navigate to the consumers record and select the **Forms** tab. From the **File** menu, select **Add Form**. Select the **“Reactive Strategies Form”** The Form Details page displays. Update the following fields:
 - a. Review = select As Needed
 - b. Review Date = defaults to today
 - c. Division = defaults to APD
 - d. Worker = pre-populated with your name
 - e. Status = defaults to Draft. Once all questions are answered, change to Complete.
 - f. Provider/Program = enter the name of the behavioral provider’s agency
3. Complete the questions in the form. When all questions are answered, change the form status to Complete.

Behavioral Services



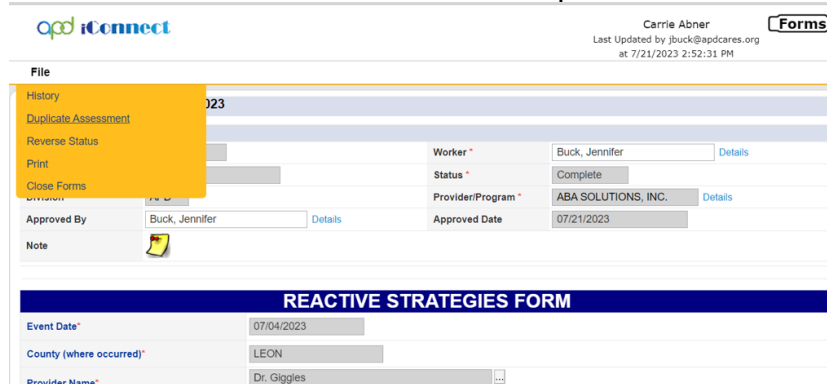
The screenshot shows the iConnect web application interface. At the top, the logo "iConnect" is on the left, and "Carrie Abner | Forms" and "7/3/2023 4:13 PM" are on the right. Below the header is a "File" menu. A dropdown menu is open, showing "Please Select Type: Reactive Strategies Form." with a link icon. Below this is a "Consumer Forms" section with fields for Review (As Needed), Review Date (07/03/2023), Division (APD), Approved By (Buck, Jennifer), Worker (Buck, Jennifer), Status (Complete), Provider/Program (ABA SOLUTIONS, INC.), and Approved Date (07/03/2023). Below this is a "REACTIVE STRATEGIES FORM" section with fields for Event Date (06/29/2023), County (where occurred) (LEON), Provider Name (Dr. Giggles), Site Name (ABA Solutions SouthWest), Facility Type (Behavior Focused (BF) Designated Group Hon), Emergency Procedures Curriculum (TEAM), and Label the Behavior (Property Destruction - Any behavior engaged in).

4. From the **File** menu, select **Save and Close Form**.



Note

If more than one reactive strategy needs to be reported, for example, the same reactive strategy is used multiple days in a row, the Duplicate Assessment functionality can be used. With the completed Reactive Strategies form open, from the **File** menu, select **Duplicate Assessment**. The page refreshes and a new, editable version of the Reactive Strategies form displays. Update the fields as applicable and save the form with a status of complete.



The screenshot shows the iConnect web application interface with the "File" menu open. The menu options are: History, Duplicate Assessment, Reverse Status, Print, and Close Forms. The "Duplicate Assessment" option is highlighted. Below the menu is the "Consumer Forms" section with fields for Review (As Needed), Review Date (07/03/2023), Division (APD), Approved By (Buck, Jennifer), Worker (Buck, Jennifer), Status (Complete), Provider/Program (ABA SOLUTIONS, INC.), and Approved Date (07/21/2023). Below this is a "REACTIVE STRATEGIES FORM" section with fields for Event Date (07/04/2023), County (where occurred) (LEON), and Provider Name (Dr. Giggles).

5. The behavioral provider does not need to notify the Regional Senior Behavior Analyst or designee because the Provider Reactive Strategies report run at least monthly, will capture the detail added by the behavioral provider on the Reactive Strategies form. Events requiring follow up are addressed in the [Reactive Strategies Event Review and Follow Up](#) section.

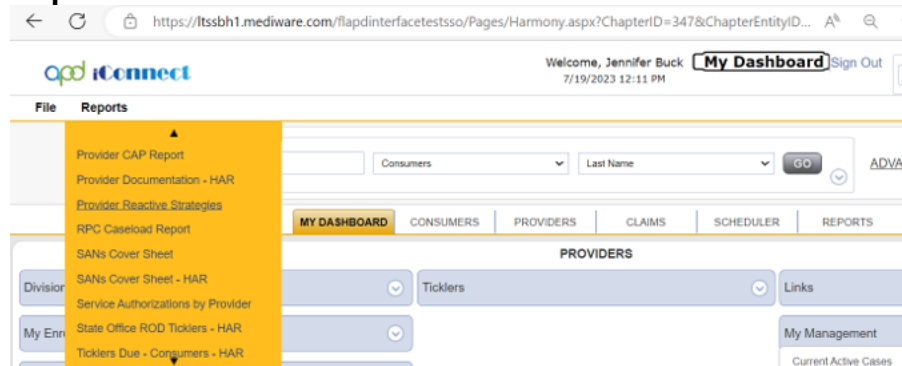
6. Reactive Strategies Event Review and Follow Up

The Reactive Strategies Event Review and Follow Up process includes the following steps:

1. The regional senior behavior analyst or designee runs the Provider Reactive Strategies report to identify events that require follow up.
2. The regional senior behavior analyst communicates with the behavioral provider via a note if a correction is needed.
3. The regional senior behavior analyst communicates with the behavioral provider via a note or meeting to obtain the information needed to complete the follow up.
4. The regional senior behavior analyst or designee completes the follow up section on the Reactive Strategies form.

Role = Region Clinical Workstream Worker

1. The regional senior behavior analyst or designee runs the Provider Reactive Strategies report to identify events that require follow up. This report is located on **My Dashboard > Reports**.



2. The regional senior behavior analyst or designee will review the report and determine if corrections or follow up is needed. (e.g. injury, death or duration exceeding 60 minutes) This report does not include data entered today.
3. If follow up is NOT needed, and corrections are NOT needed the process ends, otherwise proceed to the [Corrections Required](#) or [Follow Up Required](#) section.

6a. Corrections Required

Role = Region Clinical Workstream Worker

1. The regional senior behavior analyst or designee may identify corrections that needs to be made on the Reactive Strategy

form. The regional senior behavior analyst will reverse the status of the Reactive Strategies form so the behavioral provider can make the corrections. Navigate to the consumers record and select the **Forms** tab. From the forms list view, select the **Reactive Strategies** form. The Form Details page displays. From the **File** menu, select **Reverse Status** so the form can be updated. Update the following fields:

- Follow up Completed? = Yes
- Follow-up Event Date = enter date
- Actions Needed for Follow-Up = Request revision/update to report
- Follow up Comments = enter if needed
- Follow Up Completed By = search for an select your name
- Assessor/Worker = change to self, at the top of the page. This will allow you to find the form in the Pending Assessments Queue.
- Status = Pending

FOR APD STAFF USE ONLY

Follow-up Completed?	Yes						
Follow-up Event Date	07/19/2023						
Actions Needed for Follow-Up	Request additional information (consumer-spec) Request additional information (provider-specifi) Recommend review of individual's service need Recommend provider training Require LRC review (BASP or data review) Refer event to MCM Refer event to OI Stream ▶ ◀ Request revision/update to report						
Follow-Up Comments	asked provider to update the form						
Follow-Up Completed By:	1 Worker record(s) returned - now viewing 1 through 1 <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th style="width: 70%;">Name</th> <th>ID</th> </tr> </thead> <tbody> <tr> <td>Buck, Jennifer</td> <td>2486</td> </tr> </tbody> </table> Search			Name	ID	Buck, Jennifer	2486
Name	ID						
Buck, Jennifer	2486						

- From the **File** menu, select **Save Forms, NOT Save and Close Forms.**



Note

The regional senior behavior analyst can use the Pending status to create a queue on **My Dashboard > Pending Assessments Queue** of Reactive Strategy forms that require corrections.

Filter by Filter by Assessment = Reactive Strategies
Status = Pending.

MY DASHBOARD CONSUMERS PROVIDERS CLAIMS SCHEDULER REPORTS		
CONSUMERS	PROVIDERS	TASKS
sion Enrollments vider Selections ss	Ticklers	Links My Management Current Active Cases Enrollments SAN Queue Pending Assessments Queue

Behavioral Services

The screenshot shows the APD iConnect interface. At the top, it says "Welcome, Jennifer Buck" and "7/3/2023 4:21 PM". On the right, there's a "Pending Assessments Queue" button. Below the header, there's a "File" menu. Under "File", there's a "Filters" section with dropdowns for "Assessment" (set to "Reactive Strategies Form"), "Begins With", and "AND". There's also a "Consumer Name" dropdown with a "+" icon. Below the filters, there's a "Search" button and a "Reset" button. A message says "1 Pending Assessments Queue record(s) returned - now viewing 1 through 1". Below this is a table with columns: "Consumer Name", "Case No", "Assessment", "Review Date", "Rater", "Status", and a checkbox. The table has one row: "Abner, Carrie", "59217", "Reactive Strategies Form", "06/21/2023", "Buck, Jennifer", "Pending", and a checkbox. Below the table, there's a pagination bar with "First", "Previous", "Records per page 15", "Next", and "Last".

- The regional senior behavior analyst or designee will communicate the correction needs to the behavioral provider via a note in APD iConnect. This is done from the **Note icon** in the header of the form.

The screenshot shows the "Consumer Forms" section. It has a "Review" dropdown set to "As Needed". Below it is a "Review Date" field set to "07/03/2023" with a calendar icon. Below that is a "Division" dropdown set to "APD". Below that is an "Approved By" field. At the bottom is a "Note" field with a yellow notepad icon.



Note

The form must be saved, at least one, to display the Note icon. Save the form by selecting the **File** menu, then select **Save Form**.

- Click the **Note icon**. The Note Details page displays. Update the following fields:
 - Cost Plan Review Note = No
 - Note Type = Reactive Strategies
 - Note Subtype = Required Follow-up
 - Description = Revision Requested
 - Note = list the corrections that need to be made
 - Status = Pending
 - Recipient = behavioral provider
- From the **File** menu, select **Save and Close Notes**.
- The page refreshes and you're returned to the Reactive Strategies Form. From the **File** menu, select **Save and Close Forms**. The form status will be changed to complete later in the workflow.

Behavioral Services

The screenshot displays two overlapping forms in the iConnect system. The background form is the 'Reactive Strategies Form 6/1/2023', which includes fields for 'Consumer Forms', 'Event Date' (07/04/2023), 'County' (LEON), 'Provider Name' (Dr. Giggles), 'Site Name' (Dorothy B...), 'Facility Type' (Standard C...), 'Emergency Procedures Curriculum' (CPAM), and 'Label the Behavior' (Physical A...). The foreground form is the 'Notes' form, which includes fields for 'Division' (APD), 'Note By' (Buck, Jennifer), 'Note Date' (07/21/2023), 'Cost Plan Review Note?' (No), 'Note Type' (Reactive Strategies), 'Note SubType' (Required Follow Up), 'Description' (Revision Requested), 'Status' (Pending), and 'Date Completed'.

Role = Service Provider, Service Provider Worker

- The behavioral provider monitors **My Dashboard > Consumers > Notes > Pending** for incoming notes.

The screenshot shows the 'MY DASHBOARD' and 'CONSUMERS' tabs in the iConnect system. The 'CONSUMERS' tab is active, displaying a list of notes. The 'PROVIDERS' tab is also visible, showing 'Ticklers'. The 'Notes' section lists 'Complete' (13) and 'Pending' (6) notes.

- The behavioral provider will select the **Reactive Strategies > Required Follow Up** note from the list view and review the notes for the requested corrections.

The screenshot displays the 'Notes' list view in the iConnect system. The 'Filters' section shows 'Status' set to 'Equal To', 'Pending', and 'AND'. The 'Search' button is visible. Below the filters, a table lists 7 notes. The table has columns for 'IConnect ID', 'Consumer', 'Note Type', 'Note Sub Type', 'Note Date', 'Subject', 'Author', and 'Status'. The first three rows are visible:

IConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
59217	Abner, Carrie	LRC Review	BASP Submission	07/03/2023	BASP Revision 7/3/23	Buck, Jennifer	Pending
59217	Abner, Carrie	Behavioral Services	BASE - Additional Information Requested	07/03/2023		Buck, Jennifer	Pending
59217	Abner, Carrie	Reactive Strategies	Required Follow Up	07/03/2023	Revision Requested	Buck, Jennifer	Pending

- Navigate to the consumers record and select the **Forms** tab. From the forms list view, select the **Reactive Strategies** form in Pending status. The Form Details page displays. Update the following:
 - Questions on the form that need to be corrected per instruction in the Reactive Strategies Required Follow-up note.

Behavioral Services

- b. In the Header, keep the status as Pending.

The screenshot shows the top portion of the iConnect web application. At the top left is the 'iConnect' logo. To the right, it says 'Carrie Abner' and 'Last Updated by j.buck@apdcares.org at 7/3/2023 4:40:04 PM'. Further right is a 'Forms' tab. Below this is a 'File' menu bar. The main header area is titled 'Reactive Strategies Form 6/1/2023' with a link icon. Below the header is a 'Consumer Forms' section. It contains several fields: 'Review' (dropdown menu set to 'As Needed'), 'Review Date' (calendar icon showing 07/03/2023), 'Division' (dropdown menu set to 'APD'), 'Approved By' (text field), 'Worker' (text field with 'Buck, Jennifer'), 'Status' (dropdown menu set to 'Pending'), 'Provider/Program' (dropdown menu set to 'ABA SOLUTIONS, INC.'), and 'Approved Date' (text field). There is a 'Note' icon (yellow notepad) next to the 'Approved By' field. Below this is a blue bar with the text 'REACTIVE STRATEGIES FORM'. Underneath this bar are more fields: 'Event Date' (calendar icon showing 06/29/2023), 'County (where occurred)' (text field with 'LEON' and a 'Clear' button), 'Provider Name' (text field with 'Dr. Giggles' and a '...' button), and 'Site Name' (text field with 'ABA Solutions SouthWest' and a '77 characters remaining' indicator).

10. From the **File** menu, select **Save Form, NOT Save and Close Forms**.

11. The behavioral provider will notify the regional senior behavior analyst or designee the corrections have been made by replying to the existing Reactive Strategies note. This is done from the **Note icon** in the header of the form.

This screenshot shows a close-up of the 'Consumer Forms' section. It includes the 'Review' dropdown (set to 'As Needed'), 'Review Date' (07/03/2023), 'Division' (APD), 'Approved By' (empty), and a 'Note' icon (yellow notepad) next to the 'Approved By' field.

12. Click the **Note icon**. The Note Details page displays. Update the following fields:
- a. Note = details on the corrections that were made. Click **Append Text to Note**.
 - b. Status = Complete
 - c. Recipient = regional senior behavior analyst

apd iConnect Carrie Abner
Last Updated by j buck@apdcares.org
at 7/21/2023 3:18:54 PM **Notes**

File Tools

Notes

Division * APD

Note By * Buck, Jennifer

Note Date * 07/21/2023

Cost Plan Review Note? * No

Note Type * Reactive Strategies

Note SubType Required Follow Up

Description Revision Requested

On 7/21/2023 at 3:18 PM, Jennifer Buck wrote:
Please make the following updates.
1.
2.
3.

Note

New Text

B I U 16px **A**

Corrections have been made

Append Text to Note

Status * Complete

Date Completed 07/21/2023

13. From the **File** menu, select **Save and Close Notes**.

14. The page refreshes and you're returned to the Reactive Strategies Form. From the **File** menu, select **Save and Close Forms**. Keep the form in Pending status. The form status will be changed to complete later in the workflow.

Role = Region Clinical Workstream Worker

15. The regional senior behavior analyst or designee will monitor **My Dashboard > Consumers > Notes > Complete** for incoming notes as notification the Reactive Strategies form has been corrected.

MY DASHBOARD CONSUMERS

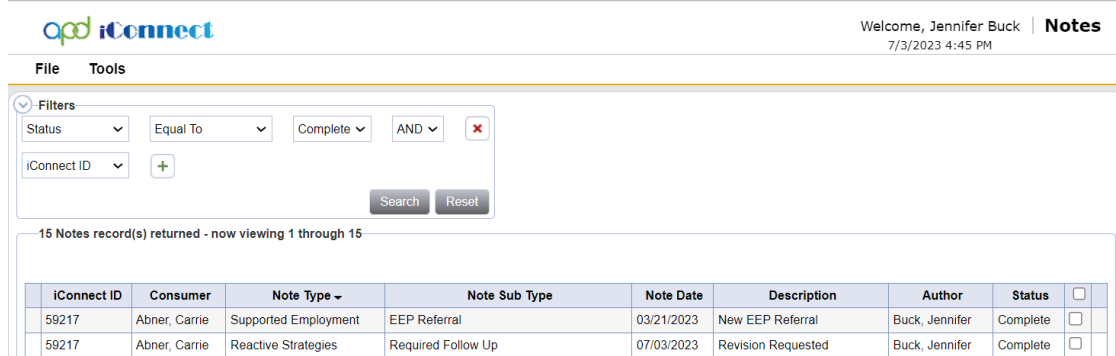
CONSUMERS PROVIDERS

Division Ticklers

Notes

Notes	
Complete	13
Pending	6

16. The regional senior behavior analyst or designee will select the **Reactive Strategies > Required Follow Up** note from the list view and review the notes that the corrections have been made.



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

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Description	Author	Status
59217	Abner, Carrie	Supported Employment	EEP Referral	03/21/2023	New EEP Referral	Buck, Jennifer	Complete
59217	Abner, Carrie	Reactive Strategies	Required Follow Up	07/03/2023	Revision Requested	Buck, Jennifer	Complete

Note



The **Provider Reactive Strategies Report** can be used to monitor follow up actions by the provider in bulk.

17. The regional senior behavior analyst or designee will review the form to determine if the revisions were sufficient. If they were sufficient, the follow up section at the bottom of the Reactive Strategies form is completed. If they were not sufficient, repeat steps 3 - 14 to create a new note for the behavioral provider and repeat the correction process.
18. If corrections have been made, navigate to the consumers record and select the **Forms** tab. From the forms list view, select the **Reactive Strategies** form in Pending status. The Form Details page displays. Update the following:
- APD Follow Up Completed = Yes
 - Follow-up Event Date = select the date
 - Actions Needed for Follow-Up = select one or more actions
 - Follow-Up Comments = enter comments
 - Follow-Up By = enter name
 - In the Header, change the status to Complete

Behavioral Services

The screenshot shows a web form titled "FOR APD STAFF USE ONLY". It contains several fields and a table:

- Follow-up Completed?**: A dropdown menu with "Yes" selected.
- Follow-up Event Date**: A date field showing "06/29/2023".
- Actions Needed for Follow-Up**: A list of actions with checkboxes and arrows. The visible options are: "Request additional information (consumer-spec)", "Request additional information (provider-specif", "Recommend review of individual's service nee", "Require LRC review (BASP or data review)", "Refer event to MCM", "Refer event to QI Stream", and "Refer event to State Office".
- Follow-Up Comments**: A text area containing the text "provider completed corrections".
- Follow-Up Completed By:**: A section showing a table of workers and a search button.

1 Worker record(s) returned - now viewing 1 through 1	
Name	ID
Buck, Jennifer	2486

Search

19. From the **File** menu, select **Save and Close Form**.

6b. Follow Up Required

The regional senior behavior analyst or designee will review the Provider Reactive Strategies report and determine if follow up is needed. Follow up information may be obtained through a note with the behavioral provider in APD iConnect or a meeting may need to be scheduled. This meeting is usually held during the LRC General Session but will be scheduled on alternate dates as needed.

Role = Region Clinical Workstream Worker

1. For events that require follow up, the regional senior behavior analyst or designee will document the follow up actions on the Reactive Strategies form. The regional senior behavior analyst will first have to reverse the status of the form before edits can be made. Navigate to the consumer's record and select the **Forms** tab. Select the completed **Reactive Strategies Form** from the list. From the **File** menu, select **Reverse Status**. The status of the form changes from Complete to Pending.
2. Update the following fields:
 - a. Follow up Completed? = Yes
 - b. Follow-up Event Date = enter date
 - c. Actions Needed for Follow-Up = Request revision/update to report
 - d. Follow up Comments = enter if needed
 - e. Follow Up Completed By = search for and select your name.
 - f. Assessor/Worker = change to self, at the top of the page. This will allow you to find the form in the Pending Assessments Queue.
 - g. Status = Pending

Behavioral Services

FOR APD STAFF USE ONLY

Follow-up Completed?

Follow-up Event Date 06/29/2023

Actions Needed for Follow-Up

Request revision/update to report
Request additional information (provider-specific)
Recommend review of individual's service needs
Require LRC review (BASP or data review)
Refer event to MCM
Refer event to QI Stream
Refer event to State Office

Request additional information (consumer-specific)
Recommend provider training

Follow-Up Comments

Follow-up comments from the Regional Senior Behavior Analyst

Follow-Up Completed By:

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

Name	ID
Buck, Jennifer	2486

Search

3. From the **File** menu, select **Save Form**.



Note

The regional senior behavior analyst can use the Pending status to create a queue on **My Dashboard > Pending Assessments Queue** of Reactive Strategy forms that require follow up.

Filter by Filter by Assessment = Reactive Strategies
Status = Pending.

MY DASHBOARD CONSUMERS PROVIDERS CLAIMS SCHEDULER REPORTS

CONSUMERS PROVIDERS TASKS

Enrollments
Enrollments
Enrollments
Enrollments
Enrollments

Ticklers Links

My Management
Current Active Cases
Enrollments
SAN Queue
Pending Assessments Queue

4. Proceed to one of the follow up method sections:

- [Follow Up During the LRC Meeting](#)
- [Follow Up via Scheduled Meeting](#)
- [Follow Up via a Note](#)

6bi. Follow Up During LRC Meeting

Role = Region Clinical Workstream Worker

- If follow-up can be obtained during the LRC meeting, it will be documented on the **LRC Case Review and Approval form** during the meeting. No additional note is needed and the Reactive Strategies form can be completed.
- After the follow up section of the Reactive Strategies form is completed from the previous section, change the status of the form to Complete.

Behavioral Services

- From the **File** menu, select **Save and Close Form**. Proceed to the [LRC Meeting section](#).

6bii. Follow Up via Scheduled Meeting

Role = Region Clinical Workstream Worker

- If follow-up must be obtained from a meeting with the behavioral provider, the Region Clinical Workstream Worker will schedule a time to meet the behavioral provider to obtain additional information via a note. This is done from the **Note icon** in the header of the form.

Consumer Forms	
Review *	As Needed ▼
Review Date *	07/03/2023 
Division *	APD ▼
Approved By	
Note	

- Click the **Note icon**. The Note Details page displays. Update the following fields:
 - Cost Plan Review Note? = No
 - Note Type = Reactive Strategies
 - Note Subtype = Required Follow-up
 - Description = Meeting Requested
 - Note = additional details of the request
 - Status = Pending
 - Recipient = behavioral provider



Carrie Abner | **Notes**
 7/21/2023 3:48 PM

File
Tools

Notes

Division *	APD ▼
Note By *	Buck, Jennifer ▼
Note Date *	07/21/2023 
Cost Plan Review Note? *	No ▼
Note Type *	Reactive Strategies ▼
Note Sub Type	Required Follow Up ▼
Description	Meeting Requested 
Note	B <i>I</i> <u>U</u> 10pt ▼ A ▼ Need to schedule a meeting to obtain additional information.
Status *	Pending ▼
Date Completed	

3. From the **File** menu, select **Save and Close Notes**.
4. The page refreshes and you're returned to the Reactive Strategies Form. From the **File** menu, select **Save and Close Forms**. Keep the form in Pending status. The form status will be changed to complete later in the workflow.



Note

The regional senior behavior analyst can use the Pending status to create a queue on **My Dashboard > Pending Assessments Queue** of **Reactive Strategy** forms that are pending follow up.

Filter by Filter by Assessment = Reactive Strategies Form Status = Pending.

If follow up details are never received, the senior regional behavioral analyst can use this queue to identify Reactive Strategy forms that need to be closed referred to QI.

File

Filters

Assessment Begins With Reactive Strategies Form AND

Consumer Name

Search Reset

1 Pending Assessments Queue record(s) returned - now viewing 1 through 1

Consumer Name	Case No	Assessment	Review Date	Rater	Status
Abner, Carrie	59217	Reactive Strategies Form	06/21/2023	Buck, Jennifer	Pending

First Previous Records per page 15 Next Last

Role = Service Provider, Service Provider Worker

- The behavioral provider monitors **My Dashboard > Notes > Pending** for incoming notes regarding the requested meeting.
- The behavioral provider meets with the regional senior behavior analyst and provides additional information.
- The behavioral provider may also need to update the Reactive Strategies form depending on the outcome of the meeting. If applicable, navigate to the consumer's Forms tab. From the list select the **Reactive Strategies form** in Pending status. Update fields as needed. Leave the form in Pending status. From the **File** menu, select **Save and Close Forms**.
- The behavioral provider will document information has been provided and/or updates have been made on the existing **Reactive Strategies > Required Follow Up** note. This is done from the **Note icon** in the header of the form.

Behavioral Services

Consumer Forms	
Review *	As Needed ▾
Review Date *	07/03/2023 
Division *	APD ▾
Approved By	
Note	

9. Click the **Note icon**. The Note Details page displays. Update the following fields:
 - a. Description = Update to Meeting Completed + mm/dd/yy
 - b. Note = details on the corrections that were made or information provided. Click **Append Text to Note**.
 - c. Status = Update to Complete
 - d. Recipient = Region Clinical Workstream Worker

 Carrie Abner
Last Updated by j.buck@apdcares.org
at 7/21/2023 3:56:15 PM

Notes

Division *	APD
Note By *	Buck, Jennifer
Note Date *	07/21/2023 
Cost Plan Review Note? *	No ▾
Note Type *	Reactive Strategies ▾
Note SubType	Required Follow Up ▾
Description	Meeting Requested
On 7/21/2023 at 3:56 PM, Jennifer Buck wrote: Need to schedule a meeting to obtain additional information.	
Note	New Text B <i>I</i> <u>U</u> 16px ▾  meeting completed. details on the corrections that were made and/or additional information provided. Append Text to Note
Status *	Complete ▾
Date Completed	07/21/2023

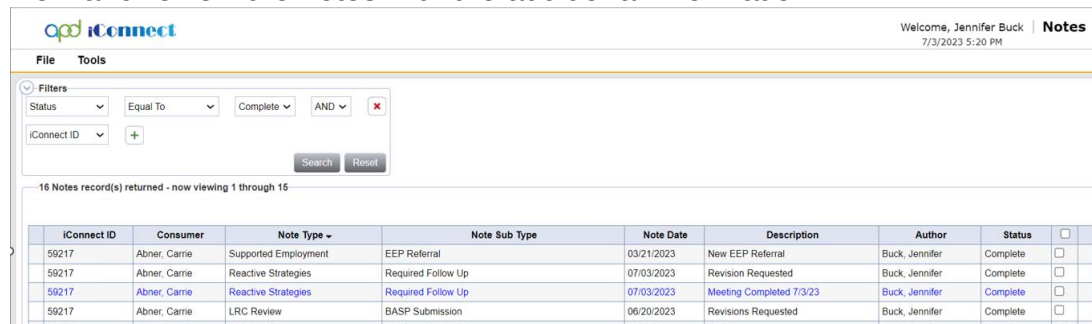
10. From the **File** menu, select **Save and Close Notes**.

11. The page refreshes and you're returned to the Reactive Strategies Form. Leave the form in Pending status. From the **File** menu, select **Save and Close Forms**.

Role = Region Clinical Workstream Worker

Behavioral Services

12. The regional senior behavior analyst or designee will monitor **My Dashboard > Consumers > Notes > Complete** for incoming notes as notification the additional information has been provided.
13. The regional senior behavior analyst or designee will select the **Reactive Strategies > Required Follow Up** note from the list view and review the notes with the additional information.



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

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Description	Author	Status	
59217	Abner, Carrie	Supported Employment	EEP Referral	03/21/2023	New EEP Referral	Buck, Jennifer	Complete	☐
59217	Abner, Carrie	Reactive Strategies	Required Follow Up	07/03/2023	Revision Requested	Buck, Jennifer	Complete	☐
59217	Abner, Carrie	Reactive Strategies	Required Follow Up	07/03/2023	Meeting Completed 7/3/23	Buck, Jennifer	Complete	☐
59217	Abner, Carrie	LRC Review	BASP Submission	06/20/2023	Revisions Requested	Buck, Jennifer	Complete	☐

14. The regional senior behavior analyst will complete the follow up section at the bottom of the Reactive Strategies form. Navigate to the consumers record and select the **Forms** tab. From the forms list view, select the **Reactive Strategies** form in Pending status. The Form Details page displays. Update the following:
 - a. Actions Needed for Follow-Up = update if needed
 - b. Follow-Up Comments = enter additional comments if needed
 - c. In the Header, change the status to Complete

FOR APD STAFF USE ONLY

Follow-up Completed? Yes

Follow-up Event Date 06/29/2023

Actions Needed for Follow-Up

Request revision/update to report
 Request additional information (provider-specifi
 Recommend review of individual's service need
 Refer event to MCM
 Refer event to QI Stream
 Refer event to State Office

Follow-Up Comments

provider completed corrections

Follow-Up Completed By:

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

Name	ID
Buck, Jennifer	2486

15. From the **File** menu, select **Save and Close Form**.
16. When the regional senior behavior analyst or designee runs the Provider Reactive Strategies report again, it will reflect the follow up has been completed.

6biii. Follow Up via a Note

Role = Region Clinical Workstream Worker

1. If follow-up can be gathered from the behavioral provider from a note, the regional senior behavior analyst will communicate with the behavioral provider via a note in APD iConnect. This is done from the **Note icon** in the header of the Reactive Strategies Form.

Consumer Forms	
Review *	As Needed ▼
Review Date *	07/03/2023
Division *	APD ▼
Approved By	
Note	

2. Click the **Note icon**. The Note Details page displays. Update the following fields:
 - a. Cost Plan Review Note? = No
 - b. Note Type = Reactive Strategies
 - c. Note Subtype = Required Follow-up
 - d. Description = Follow Up Requested
 - e. Note = details of the follow up request
 - f. Status = Pending
 - g. Recipient = behavioral provider



Carrie Abner | **Notes**
 7/21/2023 4:10 PM

File
Tools

Notes

Division *

APD ▼

Note By *

Buck, Jennifer ▼

Note Date *

07/21/2023

Cost Plan Review Note? *

No ▼

Note Type *

Reactive Strategies ▼

Note Sub Type

Required Follow Up ▼

Description

Follow Up Requested

Note

list the requests for additional [information](#)

Status *

Pending ▼

Date Completed

3. From the **File** menu, select **Save and Close Notes**.

- The page refreshes and you're returned to the Reactive Strategies Form. From the **File** menu, select **Save and Close Forms**. Keep the form in Pending status. The form status will be changed to complete later in the workflow.



Note

The regional senior behavior analyst can use the Pending status to create a queue on **My Dashboard > Pending Assessments Queue of Reactive Strategy** forms that are pending follow up.

Filter by Filter by Assessment = Reactive Strategies Form Status = Pending.

If follow up details are never received, the senior regional behavioral analyst can use this queue to identify Reactive Strategy forms that need to be closed referred to QI.

The screenshot displays the iConnect system interface. At the top, there's a navigation bar with tabs: MY DASHBOARD, CONSUMERS, PROVIDERS, CLAIMS, SCHEDULER, and REPORTS. Below this, there's a section for CONSUMERS, PROVIDERS, and TASKS. The TASKS section is expanded, showing a list of tasks: My Management, Current Active Cases, Enrollments, SAN Queue, and Pending Assessments Queue. The Pending Assessments Queue is selected. Below this, there's a search bar with filters for Assessment, Begins With, and Consumer Name. The search results show 1 Pending Assessments Queue record(s) returned. The table below shows the details of the record:

Consumer Name	Case No	Assessment	Review Date	Rater	Status
Abner, Carrie	59217	Reactive Strategies Form	06/21/2023	Buck, Jennifer	Pending

At the bottom of the table, there are pagination controls: First, Previous, Records per page (15), Next, Last.

Role = Service Provider, Service Provider Worker

- The behavioral provider monitors **My Dashboard > Notes > Pending** for incoming notes regarding the follow up request. The behavioral provider will review the Reactive Strategies note and provide the answers about the event in the same note.

Behavioral Services

The screenshot shows the iConnect Notes interface. At the top, there is a header with the iConnect logo, a welcome message for Jennifer Buck, and the date/time. Below the header is a navigation bar with 'File' and 'Tools' menus. A filters section is visible, showing a dropdown for 'Status' set to 'Pending', a comparison operator 'Equal To', and a search button. Below the filters, a table displays 7 notes. The table has columns for iConnect ID, Consumer, Note Type, Note Sub Type, Note Date, Subject, Author, and Status. The third row is highlighted, showing a note for Carrie Abner with the subject 'Follow Up Requested'.

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
59217	Abner, Carrie	Supported Employment	EEP IFS Approval	03/22/2023	FY2023 EEP Funding Approved	Buck, Jennifer	Pending
47966	Abner, Megan	Reactive Strategies	Required Follow Up	06/19/2023		Buck, Jennifer	Pending
59217	Abner, Carrie	Reactive Strategies	Required Follow Up	07/03/2023	Follow Up Requested	Buck, Jennifer	Pending

6. The reactive strategies follow up note is also accessible from the Reactive Strategies Form from the **Note icon** in the header of the form.

The screenshot shows the 'Consumer Forms' section of the Reactive Strategies Form. It includes fields for 'Review' (set to 'As Needed'), 'Review Date' (07/03/2023), 'Division' (APD), 'Approved By', and a 'Note' field with a yellow sticky note icon.

7. Click the **Note icon**. The Note Details page displays. Update the following fields:
- Note = answers questions/provides additional information about the event. Click **Append Text to Note**.
 - Status = Complete
 - Recipient = Region Clinical Workstream Worker or designee
8. From the **File** menu, select **Save and Close Notes**. The page refreshes and you're returned to the Reactive Strategies Form.

Behavioral Services

The screenshot shows the iConnect interface. On the left is the 'Reactive Strategies Form 6/1/2023' with fields for Review (As Needed), Review Date (07/19/2023), Division (APD), Approved By, Note, Event Date, and County (where occurred). On the right is the 'Notes' section for user Carrie Abner. It shows a note by Jennifer Buck dated 7/21/2023 at 4:19 PM. The note description is 'Follow Up Requested'. Below the note is a 'New Text' editor with the text 'additional information provided by the behavioral provider.' and a list with items 1, 2, and 3. The status is 'Complete' and the date completed is 07/21/2023.

9. Leave the form in Pending status. From the **File** menu, select **Save and Close Forms**.

Role = Region Clinical Workstream Worker

10. The regional senior behavior analyst or designee will monitor **My Dashboard > Consumers > Notes > Complete** for incoming notes as notification the additional information has been provided.
11. The regional senior behavior analyst or designee will select the **Reactive Strategies > Required Follow Up** note from the list view and review the notes with the additional information.

The screenshot shows the iConnect 'Notes' list view for user Jennifer Buck. It includes a filters section with Status set to 'Complete' and a search bar. Below the filters, it says '16 Notes record(s) returned - now viewing 1 through 15'. The table below lists several notes:

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Description	Author	Status	
59217	Abner, Carrie	Supported Employment	EEP Referral	03/21/2023	New EEP Referral	Buck, Jennifer	Complete	☐
59217	Abner, Carrie	Reactive Strategies	Required Follow Up	07/03/2023	Revision Requested	Buck, Jennifer	Complete	☐
59217	Abner, Carrie	Reactive Strategies	Required Follow Up	07/03/2023	Meeting Completed 7/3/23	Buck, Jennifer	Complete	☐
59217	Abner, Carrie	LRC Review	BASP Submission	06/20/2023	Revisions Requested	Buck, Jennifer	Complete	☐

12. The reactive strategies follow up note is also accessible from the Reactive Strategies Form from the **Note icon** in the header of the form.

Behavioral Services

Consumer Forms	
Review *	As Needed ▾
Review Date *	07/03/2023
Division *	APD ▾
Approved By	
Note	

Click the **Note icon**. The Note Details page displays.

13. The regional senior behavior analyst will complete the follow up section at the bottom of the Reactive Strategies form. Navigate to the consumers record and select the **Forms** tab. From the forms list view, select the **Reactive Strategies** form in Pending status. The Form Details page displays. Update the following:
- Actions Needed for Follow-Up = update if needed
 - Follow-Up Comments = enter additional comments if needed
 - In the Header, change the status to Complete

FOR APD STAFF USE ONLY					
Follow-up Completed?	Yes ▾				
Follow-up Event Date	06/29/2023				
Actions Needed for Follow-Up	Request revision/update to report Request additional information (provider-specifi Recommend review of individual's service neec Refer event to MCM Refer event to QI Stream Refer event to State Office Request additional information (consumer-spec Require LRC review (BASP or data review) Recommend provider training				
Follow-Up Comments	provider completed corrections				
Follow-Up Completed By:	1 Worker record(s) returned - now viewing 1 through 1 <table><thead><tr><th>Name</th><th>ID</th></tr></thead><tbody><tr><td>Buck, Jennifer</td><td>2486</td></tr></tbody></table> Search	Name	ID	Buck, Jennifer	2486
Name	ID				
Buck, Jennifer	2486				

14. From the **File** menu, select **Save and Close Form**.

15. When the regional senior behavior analyst or designee runs the Provider Reactive Strategies report again, it will reflect the follow up has been completed.

7. State Office Reactive Strategies (RS) Event Follow-Up and CMS Reporting

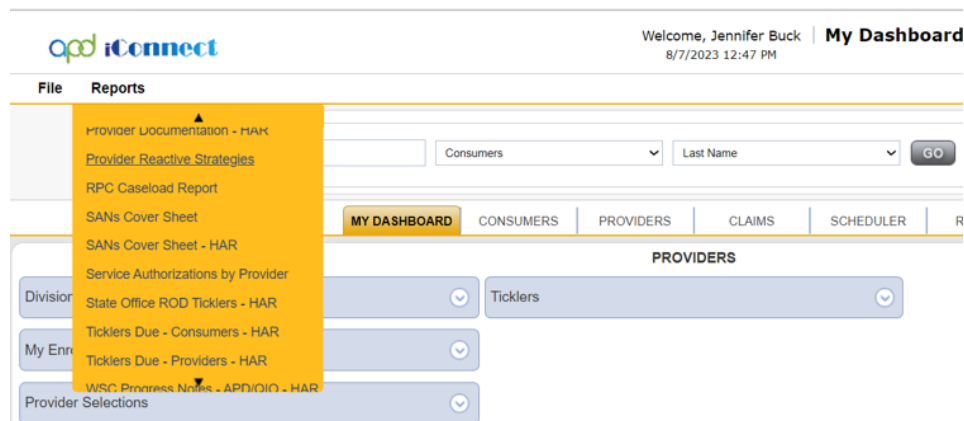
The APD agency senior behavior analyst may identify corrections or follow up needs that were not completed by the regional senior behavior analyst. The APD agency senior behavior analyst will notify the Region to work with the behavioral provider to complete the corrections and/or follow up according to the steps in the previous section of this manual.

The State Office staff Reactive Strategies (RS) Event Follow-Up and CMS Reporting process includes the following steps:

1. The APD agency senior behavior analyst runs the Provider Reactive Strategies report to identify events that require follow up that were not completed by the Region.
 - a. This same report provides data to generate statistics and graphs for the quarterly CMS report.
2. Communicate with the regional senior behavior analyst or designee via a note if a correction is needed.
3. The regional senior behavior analyst will work with the behavioral provider to make the corrections on the Reactive Strategies form.

Role = State Office Worker

1. APD agency senior behavior analyst or designee runs the Provider Reactive Strategies report to identify events that require follow up. To run the report, navigate to **My Dashboard**. From the **Report** menu, select the **Provider Reactive Strategies** report.



2. A new window opens where the report filters are selected. Enter the date range you wish to review and click **View Report**.

Behavioral Services

*** Non-Production Report: This report will not contain any data added or updated today *** - Personal - Microsoft Ed...
https://ltssbh1.mediware.com/flapdinterfacetestsso/Pages/Report.aspx?ReportID=11359&SCFId=ID&SCO...
HTML Export
Start Date: 07/01/2022 NULL End Date: 07/31/2022 NULL View Report

3. The results display on the screen and can be exported to Excel by clicking the Save icon and saving to your device.

Start Date: 7/1/2023 12:00:00 AM NULL End Date: 7/30/2023 12:00:00 AM NULL View Report
1 of 1 Find | Next
Provider Reactive Strategies Report
Report Run Time: 8/7/2023 1:02:43 PM
Export menu: XML file with report data, CSV (comma delimited), PDF, Excel, TIFF file, Word, MHTML (web archive)
Demographics
Region IConnect ID Consumer Name Primary Worker Name Review Date Form Worker Form



Note

This same report provides data to generate statistics and graphs for the quarterly CMS report. The quarterly CMS report is created in Excel, outside of APD iConnect.

4. APD agency senior behavior analyst or designee will review the report and determine whether follow up is needed. Follow up is needed for events that exceed 60 minutes, or involve the death or injury of a consumer.)
5. The APD agency senior behavior analyst or designee will communicate the correction or follow up needs to the regional senior behavior analyst via a note in APD iConnect. Navigate to the consumers record and select the tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
- Note Type = Reactive Strategies
 - Note Subtype = Required Follow-up
 - Description = (insert Event ID) Revision Requested or Follow Up Requested
 - Note = details of the corrections or follow up that is needed
 - Status = Complete
 - Recipient = regional senior behavior analyst

The screenshot shows the 'iConnect' interface for creating or editing a note. The top right corner displays the user 'Carrie Abner' and the time '7/19/2023 3:10 PM'. Below the header is a 'Notes' tab. The main form is titled 'Notes Details' and includes the following fields:

- Division ***: APD (dropdown)
- Note By ***: Buck, Jennifer (dropdown)
- Note Date ***: 07/19/2023 (calendar icon)
- Program/Provider**: (empty dropdown)
- Note Type ***: Reactive Strategies (dropdown)
- Note Sub-Type**: Required Follow Up (dropdown)
- Description**: Revision Requested OR Follow Up Requested (text area)
- Note**: A large text area with a rich text editor toolbar (Bold, Italic, Underline, 16px font size, text color) and the placeholder text 'enter the details of the corrections and/or follow up being requested.'
- Status ***: Complete (dropdown)
- Date Completed**: 07/19/2023 (text field)

6. From the **File** menu, select **Save and Close Notes**.

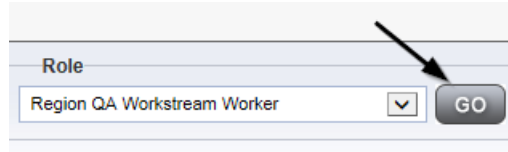
Role = Region Clinical Workstream Worker

7. The regional senior behavior analyst or designee will monitor **My Dashboard > Consumers > Notes > Complete** for incoming notes.
8. The Regional Senior Behavior Analyst or designee will select the **Reactive Strategies > Required Follow Up** note from the list view and review the note that corrections and/or follow up that is needed.
9. Proceed to [Corrections Required section](#) OR
10. Proceed to [Follow Up During LRC Meeting section](#) OR
11. Proceed to [Follow Up via Scheduled Meeting section](#) OR
12. Proceed to [Follow Up via a Note section](#).

8. As Needed: Word Merges

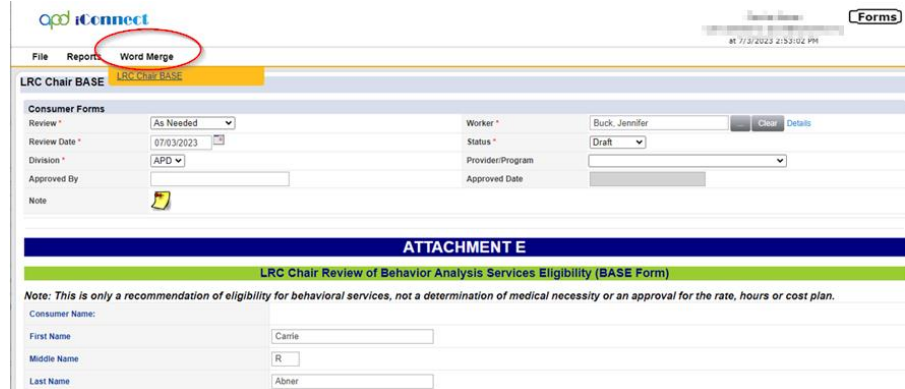
Generating the Word Merge

1. Set “Role” = Region QA Workstream Worker then click **Go**



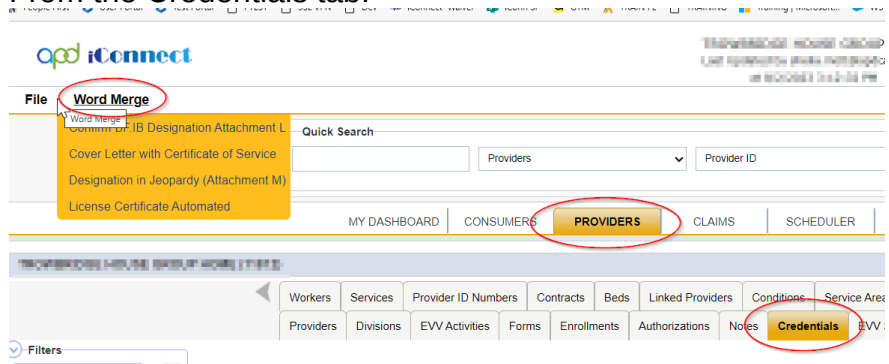
A screenshot of a web form showing a dropdown menu for 'Role'. The selected option is 'Region QA Workstream Worker'. An arrow points to a 'GO' button next to the dropdown.

2. From the appropriate **Word Merge** menu based on the workflow, select the desired word merge.
 - a. Examples of **Word Merge** menus
 - i. From a form:



A screenshot of the 'LRC Chair BASE' form in the 'Word Merge' menu. The form includes fields for 'Review', 'Review Date', 'Division', 'Approved By', 'Note', 'Worker', 'Status', and 'Provider/Program'. A red circle highlights the 'Word Merge' menu item. Below the form is a section titled 'ATTACHMENT E' with a note about the recommendation of eligibility for behavioral services.

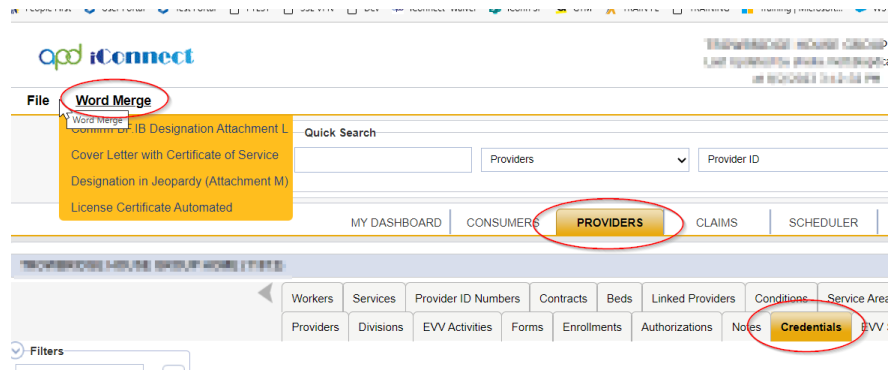
- ii. From the Credentials tab:



A screenshot of the 'Word Merge' menu with the 'Credentials' tab selected. The menu items include 'Word Merge', 'Cover Letter with Certificate of Service', 'Designation in Jeopardy (Attachment M)', and 'License Certificate Automated'. A red circle highlights the 'Word Merge' menu item. Below the menu is a section titled 'MY DASHBOARD' with tabs for 'CONSUMERS', 'PROVIDERS', 'CLAIMS', and 'SCHEDULER'. The 'PROVIDERS' tab is highlighted with a red circle. Below the dashboard is a section titled 'Filters' with a dropdown menu.

- iii. From the Providers tab:

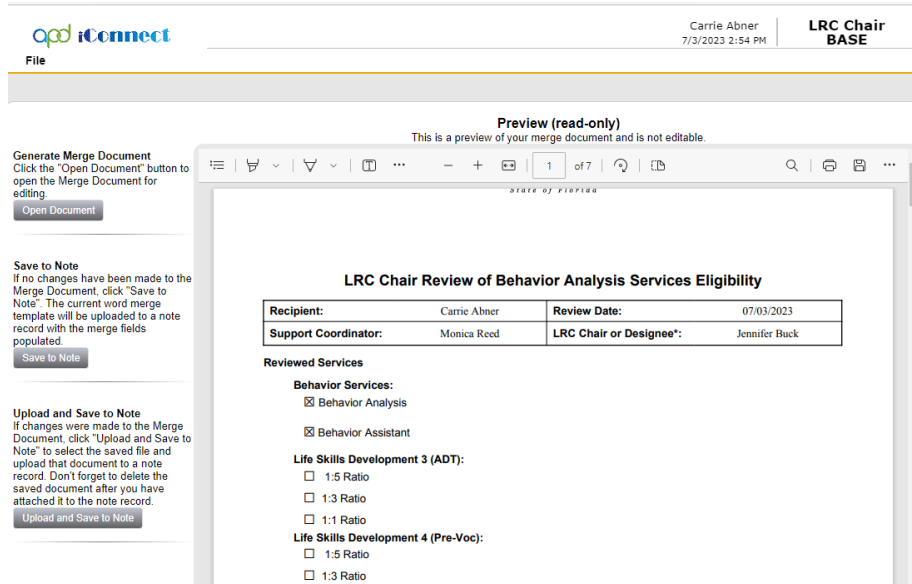
Behavioral Services



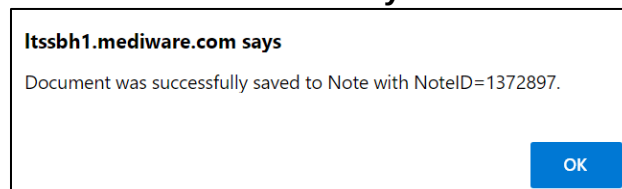
3. The Word Merge preview window displays.

No Edits Needed

1. If no edits are needed, select **Save to Note**.



2. A notification message displays confirming the Word Merge was saved to a note. Click **Okay**.



3. The Note Details page displays. Update fields per the associated workflow.

Behavioral Services

The screenshot shows the iConnect Notes form. At the top, the iConnect logo is on the left, and the user information 'Carrie Abner' and 'Last Updated by j buck@apdcares.org at 7/21/2023 10:42:03 AM' is on the right. Below the header is a 'File Tools' menu bar. The main form area is titled 'Notes Details' and contains the following fields:

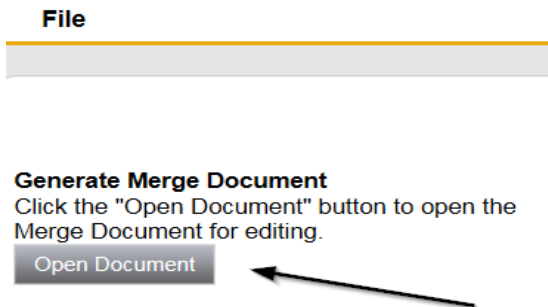
- Division: APD (dropdown)
- Note By: Buck, Jennifer (text)
- Note Date: 07/21/2023 (calendar icon)
- Program/Provider: (empty dropdown)
- Note Type: Behavioral Services (dropdown)
- Note Sub-Type: BASE Completed (dropdown)
- Description: Word Merge Template (text area)

Below these fields is a large text area for the note content. At the bottom of the form, there is a 'Status' dropdown set to 'Complete' and a 'Date Completed' field set to '07/21/2023'. A 'New Text' window is open over the text area, showing a rich text editor with bold, italic, underline, and font size (16px) options, and an 'Append Text to Note' button.

4. From the **File** menu, select **Save and Close Notes**.

Edits Needed

1. Select **Open Document** to open the Word Merge document for editing.



2. Save the Word Merge Document to the computer desktop by clicking the **Save** button and then **Open**.

Behavioral Services

The screenshot shows the 'Draft iBudget Provider Applicant Services Listings Form' with the following information:

- Applicant Business Name (if applicable):** Monica's Group Home
- Applicant Name:** A TEST Provider
- Applicant Address:** 55 South Washington St. JACKSONVILLE, FL 32244
- Email Address:** 777@anywhere.com
- Phone Number:** (888)888-8819

Two notification windows are overlaid on the form:

- The first window asks: "Do you want to save WM_P003_Draft-APD-iBudget-Regional-Provider-Services-Listing-Letter.docx (66.4 KB) from fwtest.harmonyis.net?" with 'Save' and 'Cancel' buttons. An arrow points to the 'Save' button.
- The second window states: "The WM_P003_Draft-APD-iBudget-Regional-Provider-Services-Listing-Letter (1).docx download has completed." with 'Open', 'Open folder', and 'View downloads' buttons. An arrow points to the 'Open' button.

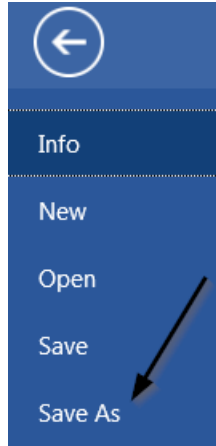
3. **Edit** the Word Merge Document as necessary.

The screenshot shows the same form as above, but with additional fields and instructions:

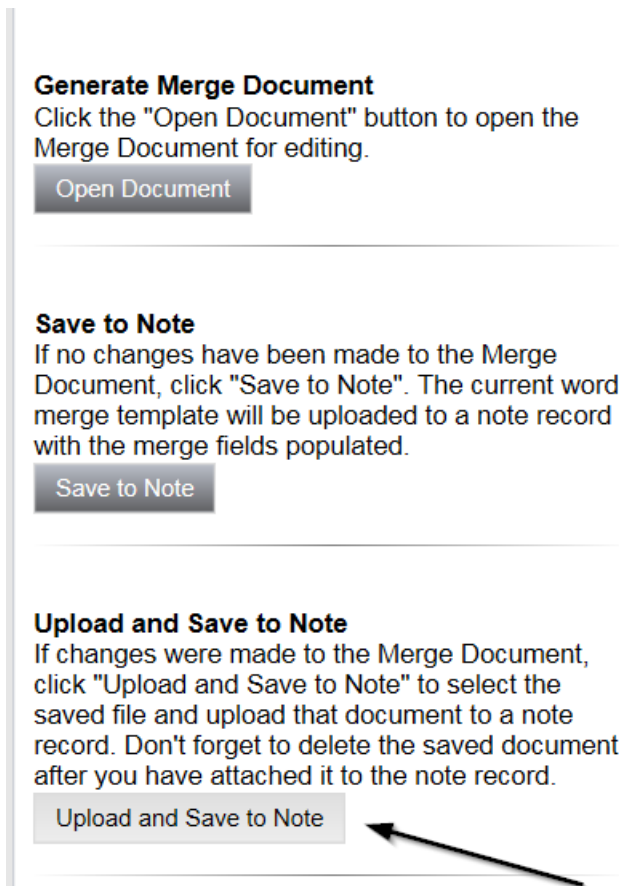
- Applicant Business Name (if applicable):** Monica's Group Home
- Applicant Name:** A TEST Provider
- Applicant Address:** 55 South Washington St. JACKSONVILLE, FL 32244
- Email Address:** 777@anywhere.com
- Phone Number:** (888)888-8819
- Solo:** ☐ **Agency:** ☐ (Arrows point to these checkboxes from the text below)
- Effective Date of Form:** Click or tap to enter a date. **Expiration Date of Form:** Click or tap to enter a date.

4. When finished with editing the Word Merge Document, click **File > Save as** to save the updated Word Merge to a specified folder on the user's device.

Behavioral Services

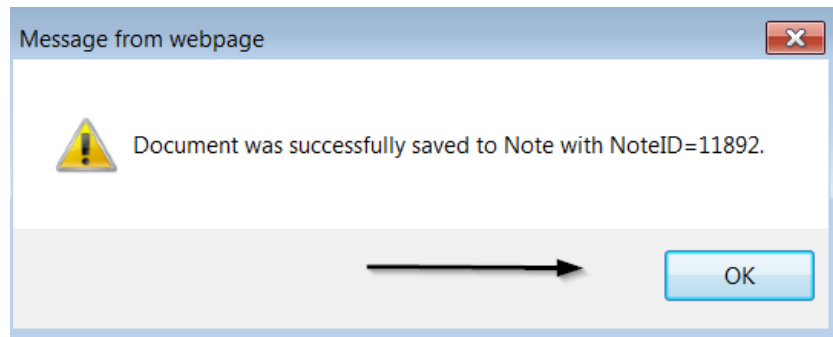
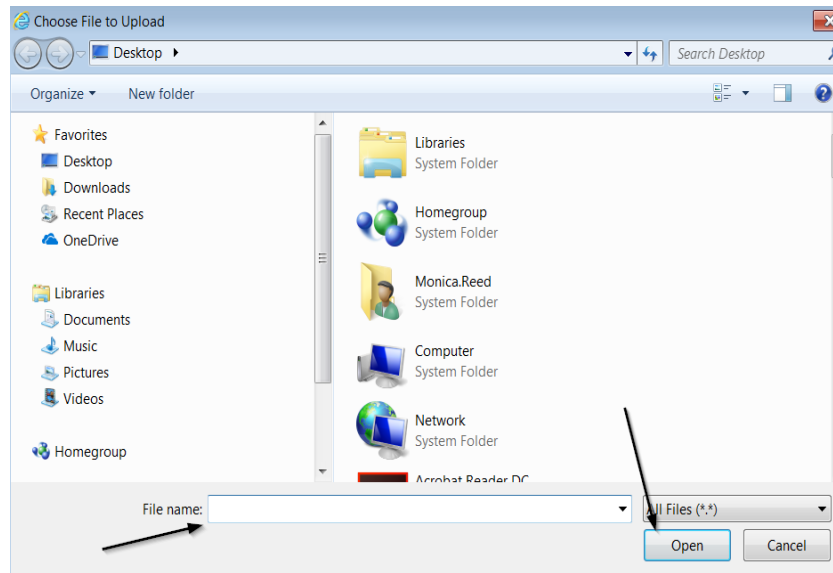


5. In APD iConnect, Click **Upload and Save to Note** after saving the word document.



6. Select the file name on the device and then Click **Open** to open the word document and then click **OK** on the pop-up message box.

Behavioral Services



7. In the new Notes Detail Screen, update the fields according to the associated workflow.

Notes Details	
Division *	APD
Note By *	Reed, Monica
Note Date *	12/01/2018
Note Type *	Initial Application
Note Sub-Type *	Draft Enrollment Listing Letter
Description	
Note	
Status *	Complete
Date Completed	12/11/2018

Behavioral Services

Attachments	
Add Attachment	
Document	Description
WM_P003_Draft APD (Budget Regional Provider Services Listing Letter pdf	Word Template: Draft APD (Budget Regional Provider Services Listing Letter
Note Recipients	
Add Note Recipient:	Clear

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

