



Troubleshooting Guide

Instructions for Specific Functions
iBudget Florida Web System

August 25, 2015



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Workstation Minimum System Requirements (For Non-Agency Workstations) and VPN Process

Workstation Minimum System Requirements (For Non-Agency Workstations)

This section lists the operating system and software requirements for all APD Web Systems. **The following computer system requirements must be met prior to submitting a Help-Desk ticket for application support:**

Operating System Requirements

Your computer's operating system must be one of the following:

- Windows 8
- Windows 7 (32-Bit)
- Windows 7 (64-Bit)
- Windows 10

Note: Mac operating systems are not supported.

For instructions on how to check the version of your operating system, [click here](#)

Internet Web Browsers Requirements

Versions of Internet Explorer supported are:

- Internet Explorer 10 (Compatibility View Only)
- Internet Explorer 11 (Compatibility View Only)

Note: Microsoft Edge Browser is not compatible.

For instructions on how to check the version of your Internet Explorer, [click here](#)

Minimum Performance (Bandwidth) Requirements

For acceptable performance the minimum Internet downloading speed must be greater than 1 megabit per second (Mbps). If the Internet downloading speed results are lower than 1 Mbps, the iBudget application will not work correctly. APD IT will not be able to assist and troubleshoot an Internet connection speed of less than 1 Mbps.

To check your current Internet speed, please [click here](#) and click on BEGIN TEST to start the test.

Miscellaneous Requirements

- The Popup Blocker for Internet Explorer must be disabled.
- Disable or uninstall any toolbars (for example: Google Toolbar, Bing Toolbar, Ask.com Toolbar, etc.).

VPN Process

This section describes the process for establishing a VPN connection.

Establishing a Virtual Private Network (VPN)

For waiver support coordinators needing VPN access, please follow these steps for establishing a VPN must be followed:

1. Request a Systems Access Request Form (SARF) from the Area Office security administrator. (Click the link [Area Office Security Administrator](#) to identify your security administrator.)
2. Complete this form and submit it to the security administrator. (If you need access to any APD system, please fill in this form.)
3. The security administrator will submit the SARF.
4. State Office staff members will send the information to the Department of Management Services (DMS), which then reviews and sends it to Hayes, the VPN vendor.
5. Once the VPN is created, Hayes will email the requestor with the credentials to log into the VPN (this can take up to 60 days).

For the link to overall DMS information on VPN, [click here](#)

For a direct link to rates, [click here](#)

Note 1: Sending your information to anyone other than the security administrator will delay your VPN approval. If you have questions about the progress of your submission, please contact your security administrator.

Note 2: For security reasons, there can only be one user per VPN account. **Sharing VPN account information is strictly prohibited.**

Additional Items needed for the iBudget Web System

For the iBudget system to work efficiently, the following three items must also be installed on your computer:

1. Adobe Reader
 - a. For instructions on downloading Adobe Reader [click here](#)
2. Microsoft Office 2003 or Later
 - a. To find what version of Microsoft Office you have [click here](#)
3. Internet Explorer Settings
 - a. Open Internet Explorer
 - b. Click on *Tools*
 - c. Click on *Internet Options*
 - d. Click on the *Security tab*
 - e. Click on *Trusted Sites*
 - f. Click on *Sites*

In the field to make the production site a trusted site, type:
<https://apps.apd.myflorida.com/loader.aspx>
 - g. Click *Add*
 - h. In the field to make the training site a trusted site, type:
<https://appsuat.apd.myflorida.com/apdtraining/loader.aspx>
 - i. Click *Add*
 - j. Click *Close*
 - k. Verify that *Trusted Sites* is still selected
 - l. Click on *Custom Level* near the bottom of that window
 - m. Scroll to the section titled *Miscellaneous*
 - n. Select *Disable* under the section titled *Use Pop-Up Blocker*
 - o. Select *Disable* under the section titled *Use Smart Screen Filter*
 - p. Scroll all the way to the bottom to the section titled *Scripting*
 - q. Select *Disable* under the section titled *Enable XSS Filter*
 - r. Click *OK*
 - s. Click *Apply*
 - t. Close out of Internet Explorer completely
 - u. Re-open Internet Explorer and log into the website.

Network Issues

401 Errors

1. **401 Domain Incorrect or Missing**

- a. When the “401 Domain incorrect or missing” error is received check to be sure your login user name is prefixed by the appropriate domain name:

APD\ - for all iBudget Users

2. **401 Unauthorized User Access**

- a. When a “401 Unauthorized User Access” error is received, an incorrect password or user name has been entered on the login page. Contact the APD Help Desk to reset your password or access the Password Self-Reset website at: <http://passwordreset.apd.fl.local:8888> . If you attempt to login three or more times your account will be locked, and you must call the APD Help Desk to reset your account.

3. **Web Page Not Found**

- a. When a “Web Page Not Found” error is received, check your VPN login status to be sure you are logged on to APD through a VPN session. The iBudget website may only be accessed if you are connected to the APD network. It is not a public website.

Log On Errors

The solutions listed below are for issues that can occur while trying to log into the iBudget Web System. The main issue will be that when you type in your username and password the system will ask you for the information again. If this occurs please attempt all of the solutions before contacting the APD Help Desk for assistance.

4. **Verify Username and Password**

- a. When entering your username and password it might have been typed in incorrectly. If this is the case the log on box will appear again. Please verify that you have typed everything in correctly and click *OK*. Remember that after typing in the username and password incorrectly three times, your iBudget account will be locked out and you will need to contact the Help Desk.

5. **Clearing Out the Cache**

- a. Another issue could occur when you try to log into iBudget. Your username and password can be stored on the machine in what is called a Cache File. Those files will need to be deleted. Please follow the instructions below to delete those files in Internet Explorer. Periodically, it is a good idea to check these files and delete them. This will help in speeding up your machine.

6. Clearing Internet Explorer Cache

1. Click *Start*
2. Click *Control Panel*
3. Click *Internet Options*
4. Select the *General Tab*
5. Under the section titled Browsing History click *Delete*
6. Select the following:
 - a. Temporary Internet Files
 - b. Form Data
 - c. Passwords
 - d. Cookies
 - e. *Note: Other selections are optional but can also be checked*
7. Click *Delete*
8. Click *Apply*
9. Click *OK*

Application Problems

Approved Services

1. **Missing Approved Services**

- a. When you are building the cost plans for consumers, if you notice that a few of the approved services for a consumer were not entered, please contact your Area Office Liaison to inform them. They will be able to add those services to the consumer for you.
- b. The Area Office Staff are the only people who can enter services for the consumer. The Help Desk will not be able to assist you.

Provider Errors

1. **Provider Missing in Service Plan When Adding or Updating a Service Plan**

- a. If you are adding or editing a service plan and the provider you are looking for does not appear in the list of providers, contact your Area Office to add the service being entered to the provider's authorized provider services.

2. **An Inactive Provider Is in the Provider Selection List**

- b. If the provider is inactive but showing active in iBudget, remove all provider services associated with that provider in iBudget; no one will be able to select them for a provider.

Business Process Errors

1. **Cost Plan exceeds the Annual Budget – Business Process Error**

- a. The cost plan is over budget – this can be verified by looking at the main cost plan information page – The field that says Remaining Balance – if the balance does not cover the service plan amount then the cost plan is over budget (See Figure 1.1).

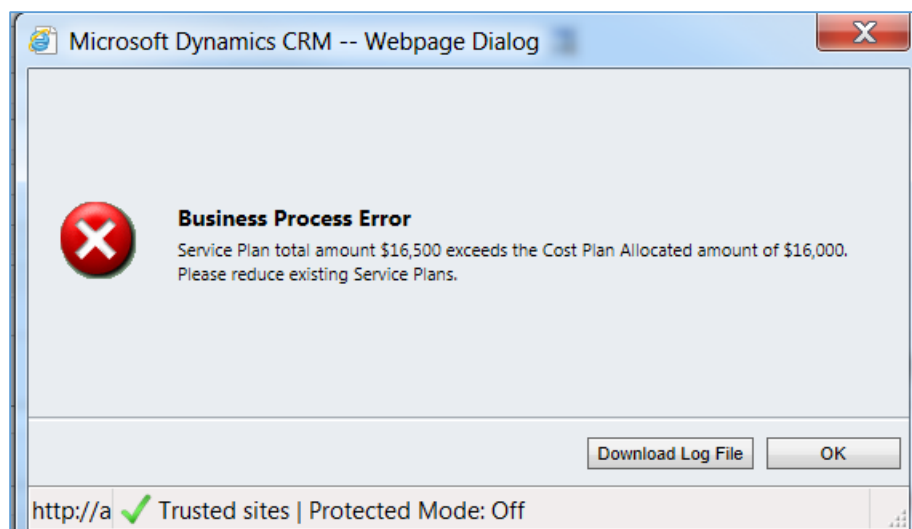


Figure 1.1

- b. The service plans need to be recalculated. This can be caused by Figure 1.2 below. If the Quarter Status and the PA Status fields are blank then the cost plan will not read the dollar amounts in the service plan totals correctly. This is something that needs to be sent to the APD.iBudget.Contacts.
- c. In the ticket identify which service plan is not displaying the fields correctly (most of the time it is the one for the same service the WAIVER SERVICE COORDINATOR (WSC) is trying to add/edit a new service plan with a different provider). You can identify the service plan by giving the provider name and the Service Code for that service. This will help the APD.ibudget.Contacts to solve these tickets in a timely manner.

| Quarter | Units | Rate | Service Rate | Amount | Begin Date | End Date |
|---------|-------|------|--------------|--------|------------|-----------|
| April | 1.00 | | \$ | \$ | 4/1/2016 | 4/30/2016 |
| May | 1.00 | | \$ | \$ | 5/1/2016 | 5/31/2016 |
| June | 1.00 | | \$ | \$ | 6/1/2016 | 6/30/2016 |

Figure 1.2

2. Object Reference Not Set to an Instance of an Object

- a. This means that the date did not fill in correctly on a service plan. Please have the user check the dates on the service plan to verify that every date (usually the last date on the plan) was filled in correctly. If that date field is blank fill in the appropriate dates. Once the dates are populated correctly the message will disappear (See Figure 1.3).

The screenshot shows a web application interface titled "Quarter 4 Details". At the top, there are fields for "Cancel Quarter" (checkbox), "Canceled Date", "Q4 PA Status" (dropdown), and "Q4 Total" (displayed as \$0.00). Below this, there are three sections for the months of April, May, and June. Each section contains input fields for "Units", "Begin Date", "End Date", "Rate", "Service Rate", and "Amount". The "End Date" field for June is highlighted in yellow. The "Service Rate" and "Amount" fields for all months are currently empty.

Figure 1.3

3. **Business Process Error: Annual cost plan, service code, service level are required fields**
 - a. This means that the page did not load correctly. Please make sure the information at the top of the service plan is grayed out and not editable. If the information has not been grayed out then please either refresh (*Cntl + R to refresh page or right click your mouse and select Reload*) the page, or wait for the page to finish loading.

4. **Business Process Error: - An error occurred in the plugin**
 - a. Refresh the page and *click* save again. This should clear the message and allow you to continue.

5. **Business Process Error: There are currently paid claims for this service plan authorization for Q4. The total for this authorization (\$xxxxxx) cannot go under \$xxxxxx for Q4".**
 - a. The provider has billed for more money than what the service plan has remaining. The service plan needs to be increased to accommodate the claims amount. Once this is done the cost plan can be saved and processed.

6. **Business Process Error: The given key was not given in the dictionary**
 - a. This happens when one of the existing service plan quarter status is blank. These can only be filled in by a developer. Please create a Help Desk ticket and assign to the APD.iBudget.Contacts.

7. **Business Process Error: Unable to update the SA Authorization: Generic SQL**
 - a. Please try again. This should fix the issue. If the issue persists, create a Help Desk ticket and assign to the APD.iBudget.Contacts.

8. **Business Process Error #8. Not enough sufficient permissions. PNG Microsoft Dynamics CRM—webpage dialog X record is unavailable the requested record was not found or you do not have sufficient permissions to view it.**
 - a. Create a Help Desk ticket and assign to the APD.iBudget.Contacts. Please download the log file and attach it to the ticket.

Service Plans

1. Building New Service Plans

- a. If a Waiver Service Coordinator (WSC) states that the Look-Up boxes are not populating correctly – Please have them verify that service plan page is finished loading. This can be done by making sure the date is filled in and the Term Service Plan is highlighted Blue on the left side of the screen.

2. Canceling a Service Plan

- a. When canceling a service plan, the funds from the service plan will not be released until the cost plan is put back into Current Approved status and the service authorizations are in a Canceled Approved status. Once that happens the funds will automatically release and the Waiver Service Coordinator (WSC) can build the new service plans.

3. Notes Not on Service Authorization but in Service Plan

- a. Verify notes were added during the service plan creation. If the note was added after the service plan was created and no other changes were made to that service plan at that time, then the notes will not appear on the Service Authorization. If a Waiver Service Coordinator (WSC) needs to add a note to a service authorization, then the notes can be added directly to the authorization itself and not onto the service plan. This will ensure the notes appear on the service authorization.

4. CRM Form Undefined Event

- a. Verify the browser version the person is using. This message will appear if the person is using any other browser than Internet Explorer 10.

Cost Plans

1. Cost Plan Ribbon

- a. Buttons will be enabled and disabled depending on the status of the cost plan for the consumer. Below is a reference list for which buttons are active:
 - i. Cost Plan Status - Current Approved: Copy button is active
 - ii. Cost Plan Status – Draft: Submit button is active
 - iii. Cost Plan Status – Pending Review: Process button is active

2. Cost Plans for Area Review

| Procedure Code Service Rule Advanced Find View | | | | | | |
|--|---|---------------------|-------------|---------------|--------------|--------------------------------|
| Procedure Code | Description (Procedure Code) | Service Code (Pr... | Daily Limit | Monthly Limit | Yearly Limit | Triggers Automatic Area Review |
| 92506UC | Speech Therapy - Assessment | 4261 | None | None | 2 | Yes |
| 92506UC | Speech Therapy - Assessment | 4261 | None | None | 2 | Yes |
| 97001UC | Physical Therapy - Assessment | 4151 | None | None | 2 | Yes |
| 97001UC | Physical Therapy - Assessment | 4151 | None | None | 2 | Yes |
| 97003UCHM | Occupational Therapy - Assessment | 4111 | None | None | 2 | Yes |
| E1399UC | Durable Medical Equipment | 4050 | 5 | None | None | Yes |
| H0031UC | Specialized Mental Health Counseling Assessment | 4250 | None | None | 1 | Yes |
| H0043UC | Residential Habilitation - Basic (day) | 4176 | None | 31 | None | Yes |
| H0043UCHI | Residential Habilitation - Minimal (day) | 4177 | None | 31 | None | Yes |
| H0043UCHN | Residential Habilitation - Extensive 1 (day) | 4179 | None | 31 | None | Yes |
| H0043UCHO | Residential Habilitation - Extensive 2 (day) | 4180 | None | 31 | None | Yes |
| H2019UCHM | Behavioral Services - Assistant | 4013 | 64 | None | None | Yes |
| H2020UC | Behavior Analysis Assessment | 4014 | None | None | None | Yes |
| S5130UCHA | Personal Supports - Quarter Hour | 4142 | 96 | None | None | Yes |
| S5130UCHO | Personal Supports - Day | 4143 | 1 | 31 | 365 | Yes |
| S5165UC | Environmental Accessibility Adaptations | 4060 | 5 | None | None | Yes |
| S5165UCSC | Environmental Accessibility Adaptations -- Assessment | 4061 | None | None | 1 | Yes |
| S5180UC | Respiratory Therapy - Assessment | 4211 | None | None | 2 | Yes |
| S5199UC | Personal Care Item, Nos | 4446 | None | None | None | Yes |
| T1000UCHM | Private Duty Nursing - Assessment | 4160 | None | 8 | 16 | Yes |
| T1001UCHO | Skilled Nursing - Assessment | 4230 | None | 8 | 16 | Yes |
| T1001UCSC | Residential Nursing - Assessment | 4200 | None | 8 | 16 | Yes |
| T2020UC | Residential Habilitation - Behavioral Focus - Minimal (day) | 4172 | None | 31 | None | Yes |
| T2020UCHI | Residential Habilitation - Behavioral Focus - Moderate (day) | 4173 | None | 31 | None | Yes |
| T2020UCHM | Residential Habilitation - Behavioral Focus - Extensive 1 (day) | 4170 | None | 31 | None | Yes |

Figure 1.4

- b. Above in Figure 1.4 is a list of all services that will trigger an automatic area review.
- c. Other reasons for Area Office review are: (These reasons can also be found in the Area Office User Guide on the iBudgetFlorida.org website.)
 - a. **Reason:** *Automatically sent to Area Office Review*
 - i. **Description:** This happens when it is the first cost plan for a consumer or when the Waiver Service Coordinator wants the Area Office to check something before approving.
 - b. **Reason:** *Services from the following critical/needed groups:*
 - i. **Description:** This happens when a service plan has not been built for an approved critical service or if the minimal amount has not been met. It will list the specific service that needs to be reviewed.

- c. **Reason:** *One or more of the consumer's needed services have not been budgeted in the cost plan*
 - i. **Description:** This happens when there is no service plan for a service that is needed to meet the health and safety requirements of the consumer. To verify this, click on *Consumer Approved Services* to make sure there is a service plan for all services listed.
- d. **Reason:** *The service Environmental Accessibility Adaptations has triggered an automatic Area Office review. Please verify that the total expenditure is not greater than \$20,000 within the last five years.*
 - i. **Description:** Environmental Accessibility Adaptations has a maximum allowed amount of \$20,000 per every five years of services. This alert reminds the Area Office staff to verify that limit has not been met yet for this consumer.
- e. **Reason:** *One or more of the consumer's needed services have been budgeted less than the current approved cost plan.*
 - i. **Description:** When a cost plan is built and copied for changing, those changes are tracked to create a history or *Historical* cost plan. The plans are then compared to the current approved plan to make sure that the changes will not affect the health and safety of the consumer. When this alert appears, it means that a needed service has been reduced. The Area Office needs to verify that this lesser amount will still meet the health and safety requirements of the consumer.
- f. **Reason:** *Waiver Support Coordination has not been budgeted as required.*
 - i. **Description:** Waiver Support Coordination is a required service for all cost plans. This alert verifies that it has been budgeted for every month of service in the cost plan. To check this, open the service plan for Support Coordination in the cost plan and verify that the amounts for each month are correct.

3. Waiver Service Coordinator needs to change service plan. WSC created a draft Cost Plan and deleted all 4 quarters for former provider. The draft cost plan still reflects the deleted units though the same draft cost plan says there are \$0 encumbered for deleted service. WSC tried to create a new cost plan but iBudget says the dates for services are overlapping for service. WSC deleted it but it still remains

- a. The WSC should cancel the quarters, not delete the units out of the quarters. You cannot change service plans for a new provider until the changes has been updated in the new system. You can no longer cancel a service plan and immediately rebuild a new plan unless there are enough funds in the remaining balance.
- b. The new steps for canceling a service plan can be found in the Waiver Service Coordinator (WSC) User Guide on Page 55. The new service plan will not be canceled until all of the steps in the user guide has been completed, if a WSC

tries to build a service plan with the exact same information that they previously canceled then the dates will be overlapping.

- 4. The WSC is trying to cancel a previous cost plan and there was no billing. It says cancelled for the 1st quarter and shows three months of money in the cost plan. She is getting the error “Business Process Error: the selected service plan record cannot be deleted.” The system is not removing the money from the cost plan**
 - a. You cannot delete a copied service plan – this is what they are trying to do when they receive that message. You can only cancel a copied service plan. The steps for canceling the service plan can be found in the Waiver Service Coordinator (WSC) User Guide on Page 55.

- 5. The user canceled the cost plan for her client and showing less money then what should be on the account. Per the user, the money has not been returned to the account. The account is showing approved for the cancellations but the money has not been refunded for the first quarter**
 - a. Verify the service plans are reflecting Cancel Approved on the status – if they are then create a Help Desk ticket, and assign to the APD.iBudget.Contacts.

- 6. Cost plan cannot be copied due to Quarter 1 for the CP service plan for consumer being in “pending transmit” status.**
 - a. This is a new thing in iBudget. If the service authorizations are in Pending Transmit for the current quarter of the FY, then the cost plan will not be able to be copied. This is to ensure the correct service authorizations are sent to FMMIS and approved.

- 7. The Total number of units for Waiver Service Coordinator (WSC) exceeds the limit**
 - a. This was a bug and has been corrected.

- 8. Budget Totals are Incorrect on the Cost Plan Information Screen**
 - a. Once a service plan has been created or modified in any way the budget totals are updated on the Cost Plan Information screen. This update can take up to 30 seconds to complete. If you are canceling a service plan please wait for the Cost Plan Information page to refresh with the new correct totals before building the new service plan or editing a different service plan. Once the Cost Plan Information page has refreshed then continue with the changes to the cost plan.

Service Authorization Errors

1. Display the Service Plan Notes on the Service Authorization

- a. When the *Service Authorization Report* is run, the *Note* from the *Service Plan* will appear at the bottom.

2. Adding Notes to a Service Authorization

- a. If the only item needing an update on a service authorization is the Note for the provider, the steps below will allow this to happen without having to copy the cost plan.

1. Log into iBudget
2. Click *Consumer*
3. Search for consumer's name
4. Double click on the consumer's name to open up the *Consumer Information* page
5. On the left side under the *Details* menu click *Service Authorizations*
6. Locate the *Service Authorization* that needs the note updated and double click
7. This will open the *Service Authorization Information* page
8. Click the *Notes* tab
9. Click on *Click Here to enter a new note*
10. Enter the note that needs to be added
11. Click *Save*
12. The new note has now been added to the *Service Authorization* and should now appear on the *Service Authorization* using the *Service Authorization Report*

3. Resending Service Authorizations

- a. When a service authorization has been returned from FMMIS as being rejected; IT has made the necessary corrections and instructions to correct it has been outlined in the *Waiver Service Coordinator User Guide (WSC)*. The instructions are titled: *How to Resend a Rejected Service Authorization*.

4. Receiving a Blank Page when Running the Service Authorization Report

- a. When running the *Service Authorization Report* you may receive a blank page back that has a date in the upper left corner and "Page 1 of 1" in the right corner. When setting the filters for the service authorization there is a filter called *PA Assign Date equals Today*. If you did not receive any PA numbers for your service authorizations today, then it will return a blank page.

If you want to find the service authorizations you received for any day besides today, please change the filter to say something other than the word *Today*. For example, you can change it *on or before* and then set the date to today's date. This will get all of the authorizations that were

received before today. You can also set the filter to *on or after* a specific date.

Miscellaneous Items

- 1. Agency Head cannot see notes on a Service Authorization**
 - a. This was a bug and has been corrected.

- 2. User has issues with IE8 and User Guides**
 - a. User needs to upgrade to IE 10.
 - b. This is an Adobe issue – Adobe no longer supports using IE 8. The only way to correct this is to upgrade the browser. If the computer cannot support a newer browser, then the user can access the iBudgetFlorida.Org website and save a copy from that website onto their desktop.

- 3. PA# assigned and is in Edit Approved status with rejected reason (79). The Waiver Service Coordinator (WSC) is trying to cancel a provider and add another provider for Respite services**
 - a. Edit Approved status after a cancellation means the cancel was rejected by FMMIS. The code (79) means that there were claims submitted on the PA number which prevented the cancellation.