WSC Training Outline

1. Introduction
2. Training Objectives
3. Fundamentals
4. iBudget Goals
5. Implementation Constraints
6. Application Roles
7. Program Overview
8. Service Desk
1. Introduction

- Fundamental Changes
- Service Changes
- Waiver Updates
  - Implementation Schedule
  - APD iBudget Rules
  - AHCA iBudget Handbook Rule
- Components of iBudget Florida
2. Training Objectives

- Acquire Knowledge of iBudget Florida Program
- Comprehend Users’ Responsibilities
- Learn the Basic WSC Tasks
- Understand the Relationship between iBudget Florida and the other APD Applications
- Identify Workflow Improvements
3. Fundamentals

• Definitions
  – **Application** – an electronic system designed for data collection and/or disbursement (workflow)
  – **Program** – an organizational process to include policies and procedures
  – **iBudget Florida** – New Waiver Program
  – **iBudget Application** – iBudget Florida’s electronic system
• Definitions
  – **Portal** – the access point for external users of an application
  – **APD Connects** – the portal for other APD applications
  – **CCR** (client central record) – the repository for the customer’s complete record.
3. Fundamentals

• Definitions

  – CRM (Customer Relationship Management) – the software on which the iBudget application is built - structured and formalized to support workflows
3. Fundamentals

APD Staff (Central and Area Office) and WSC

Providers, Vendors and Review/Audit Teams

Customers and Families (scheduled FY 12-13)

LEGEND

Data Transfers Both Ways

Data Transfers One Way

Access To
3. Fundamentals

• iBudget Florida
  – APD’s New Budgeting Tool for Waiver Cost Plans
  – Budget Allocation Formula
  – Current Processes Still Apply
  – ABC Screens vs. iBudget Screen
3. Fundamentals

- **ABC**
  - Not Going Away
  - The “System of Record” for Most of APD’s Applications
- **CCR**
  - Repository for the client complete record
  - Updated Daily from ABC
  - Access to and from iBudget
4. iBudget Goals

- Increase Flexibility and Choice
- Sustainability of the Program
- Refocus on Community Resources
- Streamline Review Process
- Spotlight Health & Safety Issues
5. Implementation Constraints

- Timeline Based on the Law and Application Design

- iBudget System Implementation
- 6 Months of iBudget Data
- Report Due March 2013
Questions
6. Application Roles (YOUse)

Application Training Components

• Submission of a NARF
• Link to the Training/Testing Site
• User Name and Password
• Responsibilities in the System(s)
• Training Guides
• Service Desk
6. Application Roles (YOUser)

Responsibilities in ABC

• Closing-out Cost Plans
• Update and Maintain All Customer Information
6. Application Roles (YOUser)

In iBudget Application
- Create Cost Plan
- Build Service Plans
- Submit Plan for Review
6. Application Roles (YOUser)

Benefits of iBudget

• Ease of Navigation
• Pre-populated Providers and Rates
• Calculations are Automatic
• Built-in Prompts
• Direct Submission to Area Office
6. Application Roles (YOUser)

Benefits of iBudget

• Service Authorizations Notice Emailed to Providers
• Budget Management Tools
• Service Utilization Tracking
• Instant Caseload Status Reporting
7. Program Overview

• Budget Allocation Formula Implementation

• Inputs for the Formula
  – Demographics
  – Program Component
  – QSI Data
7. Program Overview

- Services (handout)
  - New Ones
  - Consolidated Ones
- iBudget Draft Handbook is on iBudgetFlorida.org
7. Program Overview

• Application Controls
  – Over Budget Alerts
  – Thresholds within the application

Thresholds in the iBudget Application

<table>
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<tr>
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<td>Target Budget</td>
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Flags = Area Office Review

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8. Service Desk

Please Submit iBudget Florida Questions Online at:

• http://www.iBudgetFlorida.org

For iBudget Florida Technical Questions (such as password resets and login issues) call (850) 488-4357 (option 3)
Break time – Coming up…

- Walk-through iBudget Florida Application
- Discuss the Day-to-Day Operations
- Questions and Answers
What Now?

• Complete the iBudget Waiver Eligibility Worksheet
• Complete the Supplemental Waiver Application Form
• Read and Review the Handouts
• Remember - the only significant change is the application