

**WSC ADVISORY #2018-017**  
**SAN DOCUMENTATION REQUIREMENTS**

**ACTION REQUIRED**

**EFFECTIVE DATE: MAY 22, 2018**

Thank you for your commitment to helping individuals receive medically necessary services. The Agency for Persons with Disabilities (APD) recognizes the time commitment and effort this requires and appreciates the work of Waiver Support Coordinators (WSCs). APD is issuing this WSC Advisory to disseminate clarification to the WSCs on the Significant Additional Needs (SAN) process so that services that are medically necessary services are authorized as expeditiously as possible.

As required by the iBudget Rule (Rules 65G-4.0213 through 65G-4.0218, F.A.C.) and iBudget Waiver Handbook (Rule 59G-13.070, F.A.C.), the WSC must adjust services to meet the individual's needs and must request additional services that impact the consumer's health, safety, and welfare within five calendar days of being apprised of such need. The flexibility of the iBudget waiver program provides immediate access for the WSC to adjust services as needs change.

The flexibility of the iBudget allocation allows for:

- The use of natural or generic/community resources as the first source to use in meeting needs of the individual. WSCs should use the APD Resource Directory to find community resources at <http://resourcedirectory.apd.myflorida.com/resourcedirectory/>;
- The movement of funding from one anticipated service that may not be needed to another service that serves a greater need of the consumer;
- The use of funding that has not been used in prior months to be moved forward for use in meeting the consumer's changing needs in the future; and
- The use of waiver funds as funding of last resort

As the budget year moves forward, the WSC should monitor the use of services since some services do not get used as much as previously anticipated. This frees up money to use for other service needs. Making these immediate changes that are available to the WSC within the iBudget allocation flexibility provides the individual with more immediate access to the services needed.

If the above strategies are not sufficient and the consumer has significant additional needs that requires additional funding, the WSC should submit a SAN request to APD in accordance with iBudget Rules 65G-4.0213 through 65G-4.0218, F.A.C. When submitting a SAN request, it is critical that the WSC include all required documentation at the time of submitting the SAN request to show justification for the service needs.

APD has reviewed SAN submissions on a statewide basis and identified a trend in which SANs are submitted with incomplete information. This requires APD to request additional information to make a decision on the SAN. Most importantly, this delays the authorization for medically necessary services. Submitting complete documentation at the same time as the SAN requests streamlines the process and avoids delays due to requests for additional information.

To assist WSCs in submitting complete SAN requests, the attached *Waiver Support Coordinator (WSC) Job Aid - Significant Additional Needs (SAN) Documentation* was developed by APD. WSCs can use this document and check off items to ensure that all required information is submitted with a SAN request. WSCs are encouraged to attach the completed document with a SAN request to show the documentation that is included with the SAN submission.

Sometimes the need for additional services is requested by a provider of services. Providers play a critical role in ensuring that consumers gain access to services that meet their needs by providing documentation to WSCs in a timely manner. When a request is received from a provider for increased services, the provider should supply documentation to the WSC reflecting the need and provide all information that is related to the circumstances so that this information can be submitted along with the SAN request. This information should be gathered from the provider before a SAN is submitted. If the WSC needs assistance to obtain information from the provider, the WSC should contact the APD Regional office.

As always, if there is an immediate health and safety concern, the WSC must contact the APD Regional office immediately.

Thank you again for your continued commitment to making this process successful!