



State of Florida
Agency for Persons with Disabilities

Harmony for APD iConnect
Provider Expansions Solo to Agency Training Manual

Updated: June 09, 2023

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Chapter 11 | Expansions – Solo to Agency

Introduction

FL APD allows active providers to request 3 different types of expansions: expansion of a solo provider to become an agency provider, expansion to provide additional services, and expansion to provide services in additional geographic (service) areas. All expansions follow the same general business process as new provider applications: providers indicate what they'd like to expand, complete/submit required documentation and data, APD reviews and either approves or denies request. The differences in the process are in the documentation/data that the provider must submit and the criteria by which they are evaluated. Unique requirements for each expansion type are described in the following section. All Providers must meet the handbook requirements for expansion.



When an expansion note is received, the QA Workstream Worker will review provider notes to see if there have been any prior expansion requests that have been denied or approved. The QA Workstream Worker will need to determine the reason for any previous expansion denials.

Submit Solo to Agency Expansion Note

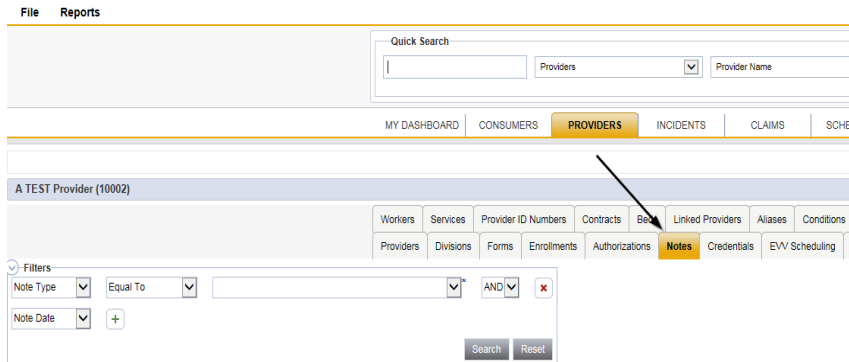


The Solo Service Provider decides that they want to expand and become an Agency Provider. They will create a note to contact the QA Workstream Worker to determine what the next steps need to be.

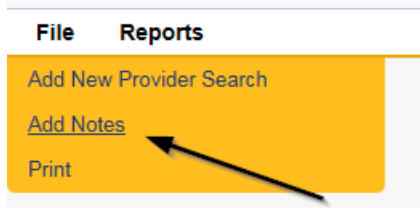
1. Set "Role" = Service Provider then click **Go**.

A screenshot of a web form. It features a label "Role" above a dropdown menu. The dropdown menu is currently set to "Service Provider" and has a small downward arrow icon on its right side. To the right of the dropdown menu is a grey button with the text "GO" in white capital letters. A black arrow points from the top right of the dropdown menu towards the "GO" button.

2. Navigate to the **Providers > Notes** tab.



3. Click **File > Add Notes**



4. In the new Note record, update the following fields:

- a. "Division" = APD
- b. "Note Type" = Provider Expansion Request
- c. "Note Subtype" = Solo to Agency Expansion
- d. "Description" = Next Steps Inquiry
- e. "Note" = Enter details about the expansion request
- f. "Status" = Pending
- g. Click the ellipsis on the "Add Note Recipient" to add the [QA Workstream Worker](#) as the Note Recipient
- h. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD ▾

Note By * Reed, Monica ▾

Note Date * 05/15/2023

Note Type * ← Provider Expansion Request ▾

Note Sub-Type ← Solo to Agency Expansion ▾

Description ← Next Steps Inquiry

Note ←

Status * ← Pending ▾

Date Completed

Attachments

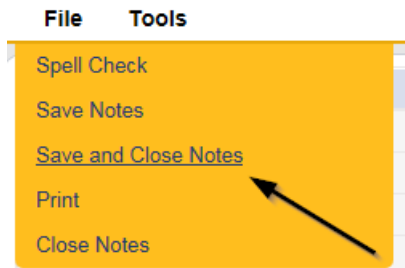
Add Attachment

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient:

5. When finished click **File > Save and Close Notes**.



**Note**

Each attachment must be under 5.76 MB. A note can have up to 10 attachments.

**CAUTION**

File names can only include letters, numbers, hyphens, underscores, and spaces. File Names cannot include special characters. You will not be able to open it and view the file.

**Note**

The accepted file types include:

- Images: bmp, dot, gif, jpg, jpeg, pict, png, tif, tiff and xps
- Documents: doc, docx, txt, ppt, pptx, and pdf
- Spreadsheet: xls, xlsx
- Sound: wav



The QA Workstream Worker will monitor My Dashboard for any Pending notes and respond to the Pending Provider Expansion Request Note.

Expansion Request Response

The QA Workstream Worker will ask the Provider if the expansion results in a new business name, new EIN and/or new Medicaid ID. They will update the pending Provider Expansion note with any questions or requests for documentation.

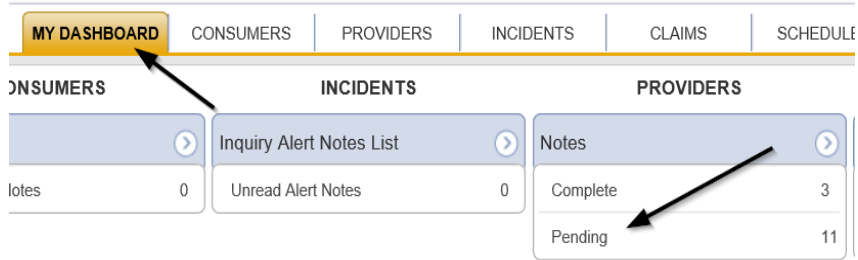
1. Set "Role" = Region QA Workstream Worker/Lead then click **Go**.

Role

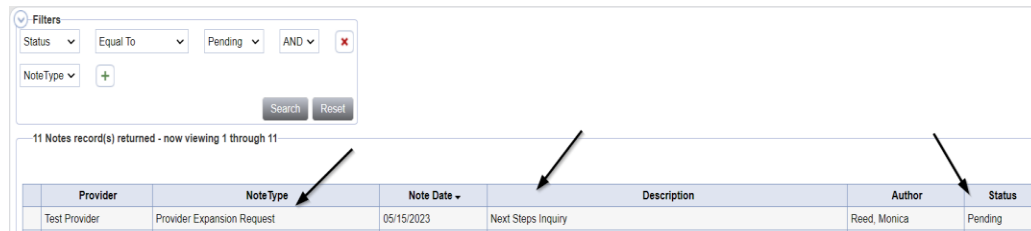
Region QA Workstream Lead

GO

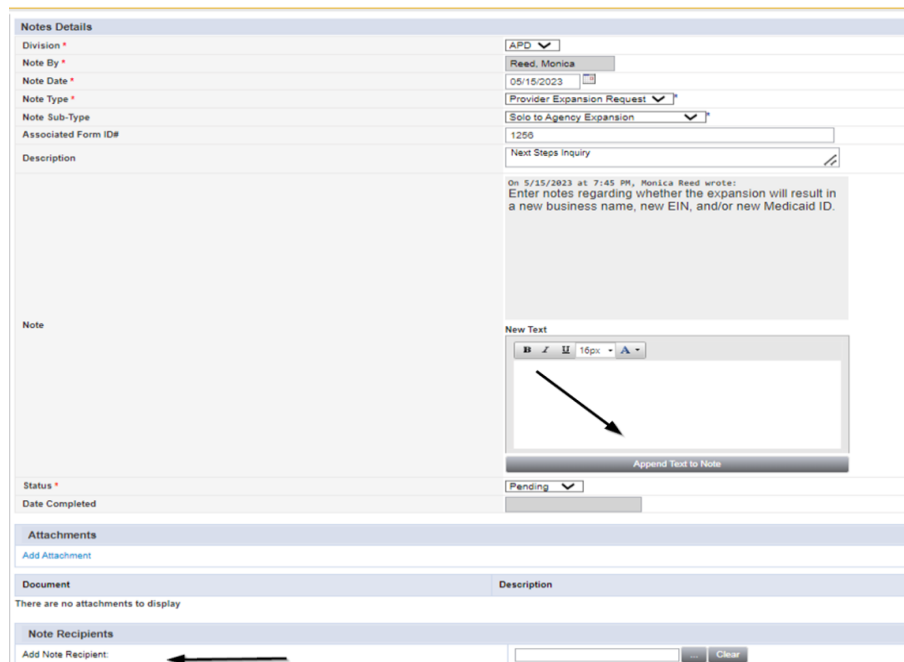
2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.



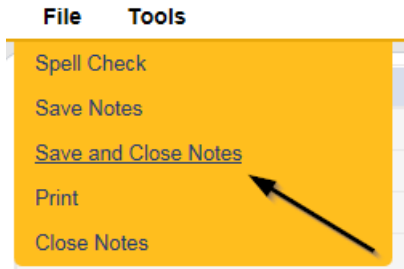
3. Select the **Note Type = Provider Expansion Request** and **Description = Next Steps Inquiry** and select the pending record via the hyperlink.



3. In the pending Note record, update the following fields:
 - a. "Append Text to Note" = Enter notes asking whether the expansion will result in a new business name, new EIN, and/or new Medicaid ID.
 - b. "Status" = Leave as *Pending*
 - c. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
 - d. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note



- When finished click **File > Save and Close Notes**.

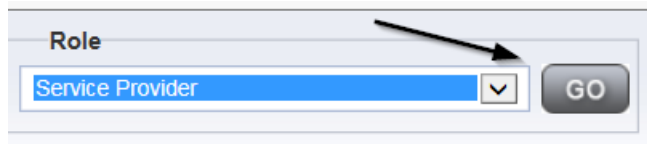


Provider Expansion Request Response

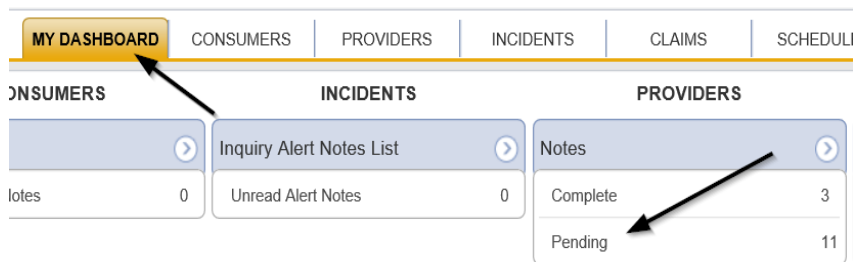


The Service Provider will review the note from the QA Workstream Worker and respond to any questions. They will update the existing pending note.

- Set "Role" = Service Provider then click **Go**.



- Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

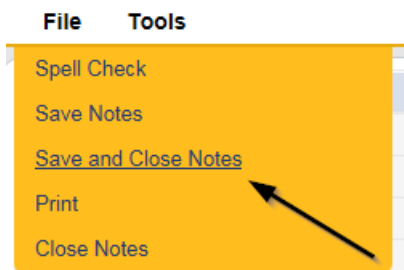


- Select the **Note Type = Provider Expansion Request** and **Description = Next Steps Inquiry** and select the pending record via the hyperlink.



4. In the pending Note record, update the following fields:
 - a. "Append Text to Note" = Enter notes to respond to questions from the QA Workstream Worker
 - b. "Status" = Leave as *Pending*
 - c. Click the ellipsis on the "Add Note Recipient" to add the *QA Workstream Worker* as the Note Recipient
 - d. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

5. When finished click **File > Save and Close Notes.**



Request to Complete Provider Expansion Form



The QA Workstream Worker will update the existing Provider Expansion Request note to advise the Service Provider to submit the Provider Expansion Request form and attach supporting documentation by creating a new Expansion Intake Note.

1. Set "Role" = QA Workstream Worker then click **Go**.

Role: Region QA Workstream Lead [GO]

2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

MY DASHBOARD	CONSUMERS	PROVIDERS	INCIDENTS	CLAIMS	SCHEDULE
Notes: 0	Inquiry Alert Notes List: 0	Unread Alert Notes: 0	Notes: Complete (3), Pending (11)		

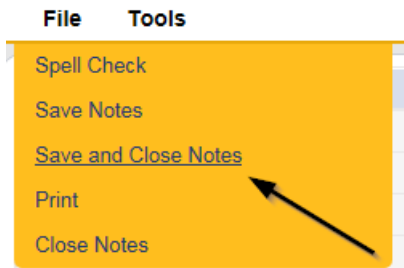
3. Select the **Note Type = Provider Expansion Request** and **Description = Next Steps Inquiry** and select the pending record via the hyperlink.

Filters: Status = Pending, NoteType = Provider Expansion Request

Provider	NoteType	Note Date	Description	Author	Status
Test Provider	Provider Expansion Request	05/15/2023	Next Steps Inquiry	Reed, Monica	Pending

4. In the pending Note record, update the following fields:
 - a. "Append Text to Note" = Enter notes to advise the Service Provider to complete the Provider Expansion Request form and submit supporting documentation.
 - b. "Status" = Leave as Pending
 - c. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
 - d. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

5. When finished click **File > Save and Close Notes.**



Complete Provider Expansion Request Form

1. Set "Role" = Service Provider then click **Go.**

2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

MY DASHBOARD	CONSUMERS	PROVIDERS	INCIDENTS	CLAIMS	SCHEDULE
CONSUMERS		INCIDENTS		PROVIDERS	
Notes	0	Inquiry Alert Notes List	0	Complete	3
		Unread Alert Notes	0	Pending	11

3. Select the **Note Type = Provider Expansion Request** and **Description = Next Steps Inquiry** pending record via the hyperlink.

Provider	Note Type	Note Date	Description	Author	Status
Test Provider	Provider Expansion Request	05/15/2023	Next Steps Inquiry	Reed, Monica	Pending

4. Review the note directing the Provider to create the Provider Expansion Request form in iConnect.

5. Navigate to the **Providers > Forms** tab

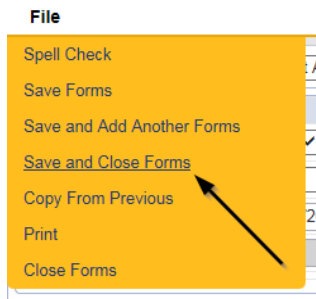
Division	Form Name
APD	Group Home Facility Checklist
APD	Group Home Personnel Record Review
APD	Provider Enrollment Application

6. Click **File > Add Forms**

7. Select "Please Select Type" as "Provider Expansion Request" from the drop-down list.

8. Update the following Header fields on the form:
 - a. "Division" = APD
 - b. "Review" = Initial
 - c. "Status" = Complete
 - d. Complete all fields on the Provider Expansion Request Form

9. When finished, click **File > Save and Close Forms**



Sign Provider Expansion Request Form



The Service Provider will print, sign, scan and attach the Provider Expansion Request form to the existing note.

1. Set "Role" = Service Provider then click **Go**.

2. Navigate to the **Providers > Forms** tab and click the hyperlink for the Provider Expansion Request form.

Test Provider (21347)

Workers Services Provider ID Numbers Contracts Beds Linked Providers Conditions Service Area Admin Actions

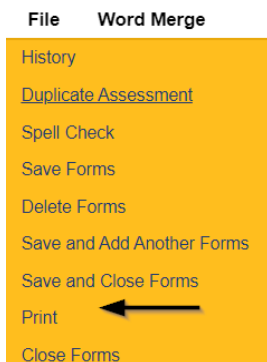
Providers Divisions EVV Activities **Forms** Enrollments Authorizations Notes Credentials EVV Scheduling CAP Appointments Provider Adj

Filters
Division
Search Reset

6 Forms record(s) returned - now viewing 1 through 4

Division	Form ID	Form Name	Review	Review Date	Status	Worker
APD	364	Provider Expansion Request_NEW	Initial	05/15/2023	Complete	Reed, Monica

3. Select **File > Print** from within the completed form.



4. The Service Provider will print, sign and scan the hard copy and then attach it to the Provider Expansion Request pending note

5. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULE

CONSUMERS INCIDENTS PROVIDERS

Notes 0 Inquiry Alert Notes List 0 Unread Alert Notes 0

Notes Complete 3 Pending 11

6. Select the **Note Type = Provider Expansion Request** and **Description = Next Steps Inquiry** and select the pending record via the hyperlink.

Filters
Status Equal To Pending AND
NoteType
Search Reset

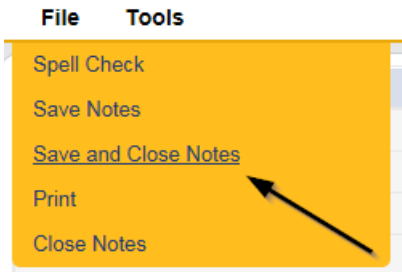
11 Notes record(s) returned - now viewing 1 through 11

Provider	Note Type	Note Date	Description	Author	Status
Test Provider	Provider Expansion Request	05/15/2023	Next Steps Inquiry	Reed, Monica	Pending

7. In the pending Note record, complete the following fields:
 - a. "Status" = Leave as Pending
 - b. Click "Add Attachment" and search for the copy of the signed Provider Expansion Request form on the user's device. Click Upload.

- c. Click the ellipsis on the "Add Note Recipient" to add the *QA Workstream Worker* as the Note Recipient
 - d. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

- When finished click **File > Save and Close Notes**.

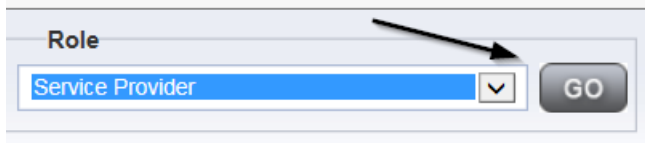


Expansion Intake Note

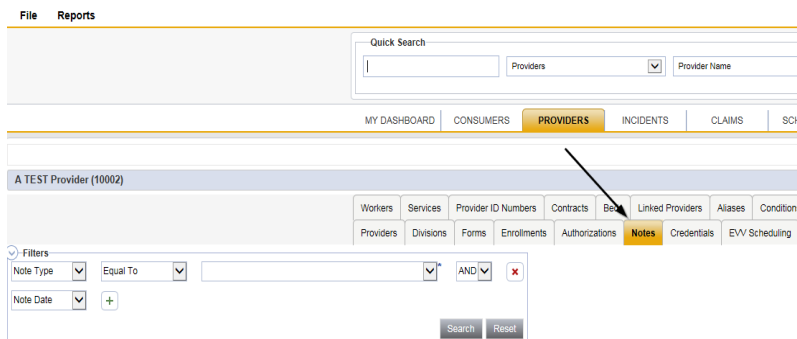


Expansion Intake documentation can include requisite documentation for a qualifying worker or other information. The Service Provider will scan and save a copy of the intake or qualifying worker documentation to their device and attach each to an individual note.

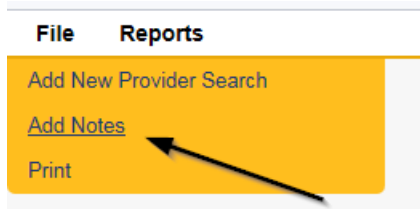
- Set “Role” = Service Provider then click **Go**.



- Navigate to the **Providers > Notes** tab.



- Click **File > Add Notes**.



4. In the new Note record, update the following fields:
- a. "Division" = APD
 - b. "Note Type" = Expansion Intake
 - c. "Note Subtype" = Select a value from the list below or select Qualifying Worker Documentation
 - i. Attestation of Good Moral Character
 - ii. Attestation of Policies/Procedures
 - iii. Final APD iBudget Waiver Sign-off
 - iv. Level II Background Screening
 - v. Org Chart
 - vi. Professional Liability Insurance – naming APD as certificate holder
 - vii. Provider Signed MWSA
 - viii. Qlarant Review
 - ix. Qualifying Worker Documentation
 - x. SS4/W9
 - xi. Transportation Council Approval
 - xii. Vehicle Registration/Insurance
 - d. "Description" = same as Note Subtype
 - e. "Note" = Enter notes
 - f. "Status" = Complete
 - g. Click "Add Attachment" and search for the copy of the supporting documentation on the user's device. Click Upload and Add Another until finished

A screenshot of a web form for adding an attachment. The form has the following fields and controls:

- File**: A text input field followed by a 'Browse...' button.
- File Name**: Two radio buttons. The first is 'from uploaded file' (selected) and the second is 'create new' (unselected). A text input field is next to the 'create new' option.
- Description**: A text input field.
- Category**: A dropdown menu with a downward arrow icon. A black arrow points to this dropdown.
- Buttons**: Two buttons at the bottom: 'Upload' and 'Upload and Add Another'.
- Note**: A red text note below the buttons: 'Note: Maximum size for attachment is set to 5.76 MBytes.'

Notes Details

Division *

Note By *

Note Date *

Note Type *

Note Sub-Type

Description

Note

Status *

Date Completed

Attachments

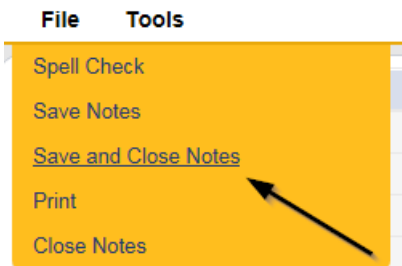
[Add Attachment](#)

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient:

5. When finished click **File > Save and Close Notes**.



6. Repeat steps 3 – 5 to add additional notes. Add one note per document.

Ready to Submit



When the Service Provider has completed the expansion request and attached all required intake documentation, they will update the existing pending note to submit the request.

1. Set "Role" = Service Provider then click **Go**.

2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

3. Select the **Note Type = Provider Expansion Request** and **Description = Next Steps Inquiry** and select the pending record via the hyperlink.

6. In the pending Note record, update the following fields:
 - a. "Note Subtype" = *Update to Ready to Submit*
 - b. "Description" = *Update to Ready to Submit*
 - c. "Note" = Enter any pertinent information
 - d. "Status" = Leave as Pending
 - e. Click the ellipsis on the "Add Note Recipient" to add the *QA Workstream Worker* as the Note Recipient
 - f. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 05/15/2023

Note Type * Provider Expansion Request

Note Sub-Type ← Ready To Submit

Description ← Ready to Submit

Note

On 5/15/2023 at 7:45 PM, Monica Reed wrote:
Enter notes regarding whether the expansion will result in a new business name, new EIN, and/or new Medicaid ID.

New Text

B I U 16px A

Append Text to Note

Status * Pending

Date Completed

Attachments

Add Attachment

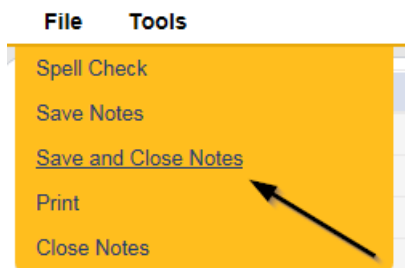
Document	Description
There are no attachments to display	

Note Recipients

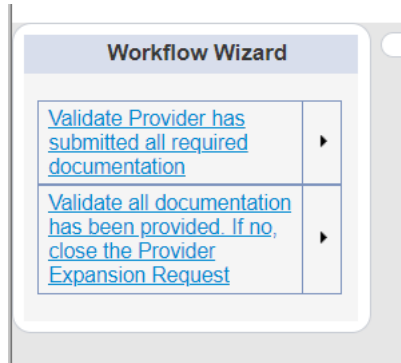
Add Note Recipient: ←

Clear

7. When finished click **File > Save and Close Notes**.



8. Upon saving the note, two Workflow Wizards are triggered that are due in 30 and 70 calendar days.



- a. Tickler - “Validate Provider has submitted all required documentation”
- b. Assigned to the QA Workstream Worker (Monitor 1)
- c. Due on the **30th** calendar day from the “Provider Expansion Request/Ready to Submit” pending note. Region has 30 days to review the entire expansion request and provide ONE list of deficiencies.
- d. Tickler - “Validate all documentation has been provided. If no, close the Provider Expansion Request”
- e. Assigned to the QA Workstream Worker (Monitor 1)
- f. Due on the **70th** calendar day from the “Provider Expansion Request/Ready to Submit” pending note. Provider has 45 days to respond to list of deficiencies in one response.)

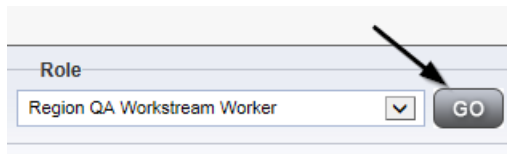
9. The QA Workstream Worker will access Ticklers via **My Dashboard**.

Request Complete Note

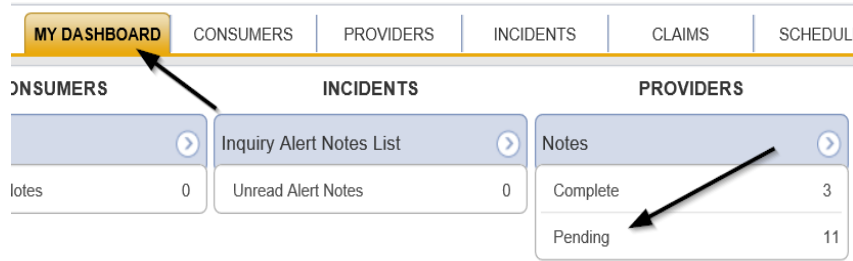


The QA Workstream Worker will review the Solo Provider record (Expansion Request Form, Notes, and any other pertinent tabs) to ensure provider meets minimum handbook requirements. If the Provider expansion request is complete, they will update the existing note to inform the Service Provider.

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



- Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

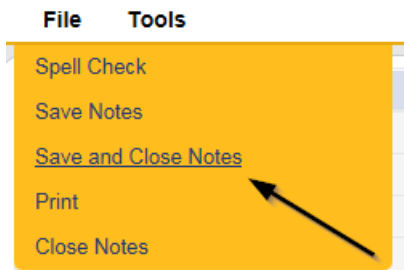


- Select the **Note Type = Provider Expansion Request** and **Description = Ready to Submit** and select the pending record via the hyperlink



- In the pending Note record, update the following fields:
 - "Note Subtype" = Update to *Request Complete*
 - "Description" = Update to *Request Complete*
 - "Append Text to Note" = Enter notes and add any relevant information
 - "Status" = Leave as *Pending*
 - Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
 - Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

5. When finished click **File > Save and Close Notes**.



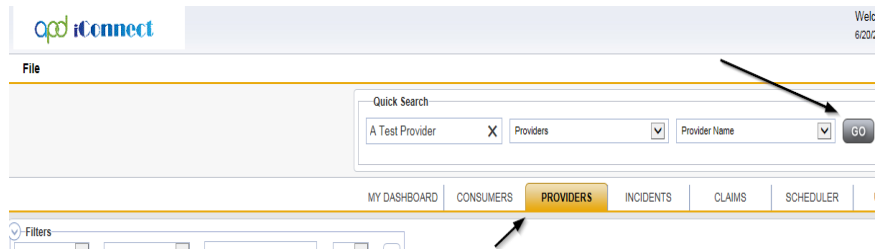
Generate Final-APD iBudget Waiver Sign-Off form



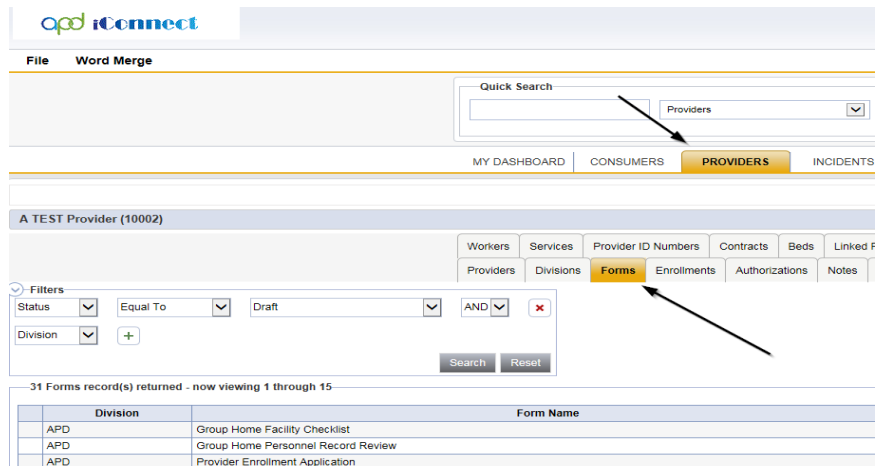
The QA Workstream Worker will generate the Final APD iBudget Waiver Sign-off form when no new Medicaid ID is needed. If a new Medicaid ID is needed proceed to [Generate Initial APD iBudget Waiver Sign-Off](#)

1. Set "Role" = Region QA Workstream Worker/Lead then click **Go**.

2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click Go.

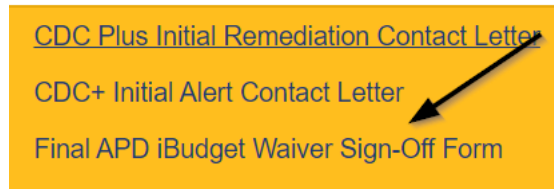


3. The Provider's record will display. Navigate to the **Providers > Forms** tab.



4. Select **Word Merge > Final APD iBudget Waiver Sign-Off Form**.

Word Merge



5. Generate the Word Merge and set the effective date to at least be a *minimum of 10 calendar days AND the first day of a future month* then Click **Upload and Save to Note**.

Final iBudget Waiver Sign-Off Form

Provider Name: Test Provider

DBA (if applicable):

Contact Name: John Test

Provider Address: 9125 Branchwater Ct Jacksonville, FL 32244

Email Address:

Phone Number:

Designation: Solo: Agency:

Qualified Organization: WSC of a Qualified Organization:

Home Region: Click to Select Region.

Approved Regions: Northwest Northeast Central Suncoast Southeast Southern

9 Digit Medicaid ID: FL545454

Effective Date of form: Click or tap to enter a date.

6. Update the following fields on the Notes Detail Screen:
 - a. "Division" = APD
 - b. "Note Type" = Expansion Request
 - c. "Note Subtype" = ROM Review
 - d. "Associated Form ID#" = Enter Form ID# (e.g., Provider Expansion Form ID#)
 - e. "Description" = ROM Review
 - f. "Note" = Enter notes
 - g. "Status" = Complete
 - h. Click "Add Attachment" and search for the copy of the signed Provider Expansion Request form on the user's device. Click Upload.

File

File Name from uploaded file
 create new

Description

Category

Note: Maximum size for attachment is set to 5.76 MBytes.

- i. Click the ellipsis on the "Add Note Recipient" to add the *ROM/Designee* as the Note Recipient
 - j. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 05/15/2023

Note Type * Expansion Request

Note Sub-Type ROM Review

Associated Form ID# 704

Description ROM Review

Note

Status * Complete

Date Completed 05/15/2023

Attachments

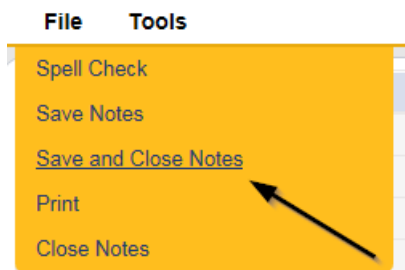
Add Attachment

Document	Description
FINAL APD iBudget Waiver Sign-Off Form.pdf	Word Template: Final APD iBudget Waiver Sign-Off Form

Note Recipients

Add Note Recipient: Clear

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



ROM Approval



The ROM will print, sign, scan and attach a copy of the Final APD iBudget Waiver Sign-off form to a new Provider note.

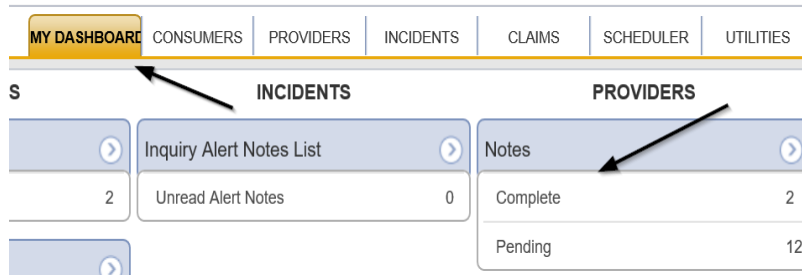
1. Set "Role" = ROM/Deputy ROM then click **Go**.

Role

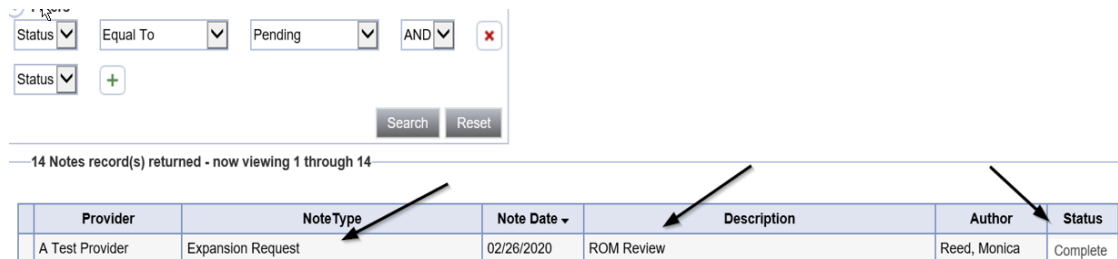
ROM/Deputy ROM

GO

2. Navigate to the **My Dashboard > Providers > Notes > Complete** and click the hyperlink for the Pending notes.



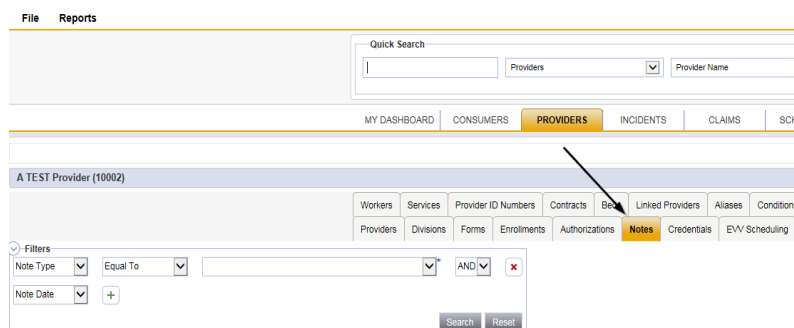
3. Select the **Note Type = Expansion Request** and **Description = ROM Review** and select the record via the hyperlink.



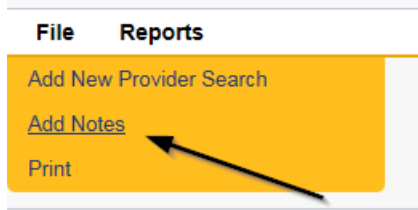
4. Click on the attachment within the ROM Review note and then click **Open** on the pop-up message box.



5. Select **File > Print** within the document.
6. The ROM/Designee will sign the hard copy, scan and save an electronic copy to a specified folder on their device. They will then add a new note.
7. Navigate to the **Providers > Notes** tab.

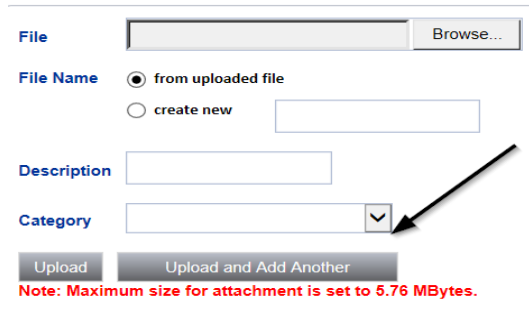


8. Click **File > Add Notes**.



9. In the new Note record, update the following fields:

- a. "Division" = APD
- b. "Note Type" = Provider Expansion Request
- c. "Note Subtype" = ROM Approval
- d. "Associated Form ID#" = Enter Form ID#
- e. "Description" = ROM Approval
- f. "Note" = Enter notes
- g. "Status" = Complete
- h. Click "Add Attachment" and search for the Signed Final APD iBudget Waiver Sign-Off Form on the user's device. Click Upload.



- i. Click the ellipsis on the "Add Note Recipient" to add the [QA Workstream Worker](#) as the Note Recipient
- j. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note
- k. Click the ellipsis on the "Add Note Recipient" to add the [Service Provider](#) as the Note Recipient
- l. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 05/15/2023

Note Type * Provider Expansion Request

Note Sub-Type ROM Approval

Associated Form ID# 759

Description ROM Approval

Note

Status * Complete

Date Completed 05/15/2023

Attachments

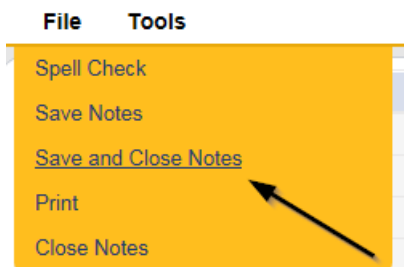
[Add Attachment](#)

Document	Description
There are no attachments to display	

Note Recipients

Add Note Recipient: ... Clear

10. When finished click **File > Save and Close Notes**.



Update Credentials



The QA Workstream Worker will monitor My Dashboard for incoming notes. The QA Workstream Worker was added as a recipient to the ROM Approval note. This note serves as notification to the QA Workstream Worker to end the iBudget Waiver Solo Provider Credential.

1. Set "Role" = QA Workstream Worker then click **Go**.

2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click Go.

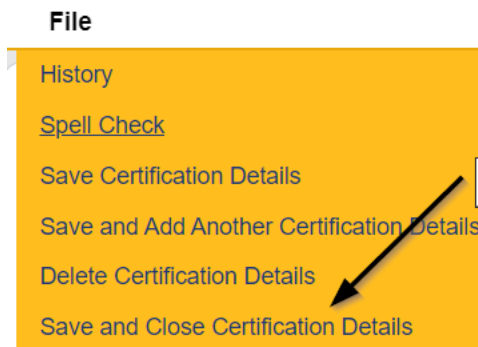
3. Navigate to the **Providers > Credentials** tab and select the iBudget Waiver Solo Provider credential via the hyperlink on the row.

Credential	Type	Credential Number	Effective Date
Certification	iBudget Waiver Solo Provider		04/01/2023

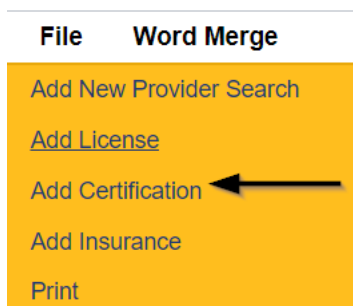
4. Update the following fields:
 - a. "Expiration Date" = *one day before effective date of Final APD iBudget Waiver Sign-Off Form*
 - b. "Status" = Expansion/Closed

Certification Details	
Credential Type *	Certification
Certification Type	iBudget Waiver Solo Provider
Effective Date	04/01/2023
Expiration Date ←	05/14/2023
Comment	
Status ←	Expansion/Closed
QA Workstream Worker	

5. When finished, click **File > Save and Close Certification Details**.



6. Select **File > Add Certification** to add the new iBudget Waiver Agency Provider Certification record.



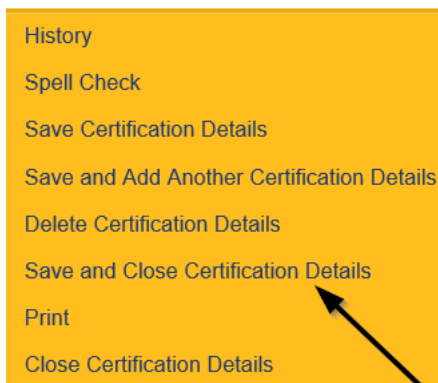
7. Update the Certification Details page for the following fields:

- "Effective Date" = *Effective Date of Final APD iBudget Waiver Sign-Off Form*
- "Expiration Date" = LEAVE THIS FIELD BLANK
- "Status" = Active
- "QA Workstream Worker" = Provider Enrollment Staff name that is updating the Certification record

Certification Details	
Credential Type *	Certification
Certification Type ←	iBudget Waiver Agency Provider
Effective Date ←	05/15/2023
Expiration Date	<input type="text"/>
Comment	<input type="text"/>
Status ←	Active ▼
QA Workstream Worker ←	Reed, Monica

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

File



End Services

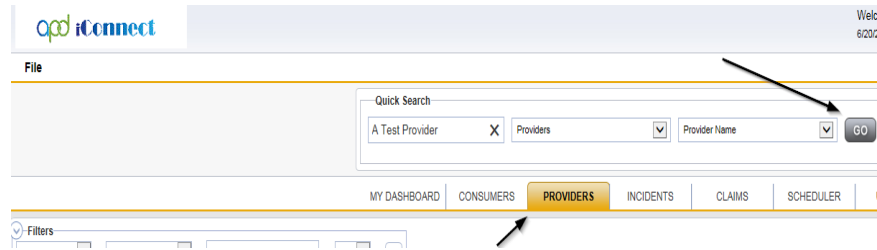


The QA Workstream Worker will end services at the solo rate.

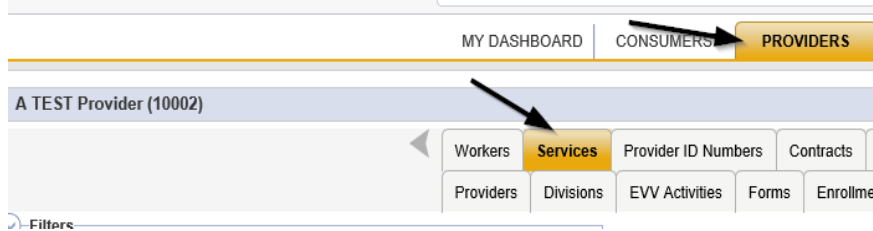
1. Set “Role” = Region QA Workstream Worker then click **Go**.

A screenshot of a form with a 'Role' dropdown menu set to 'Region QA Workstream Worker' and a 'GO' button next to it. A black arrow points to the 'GO' button.

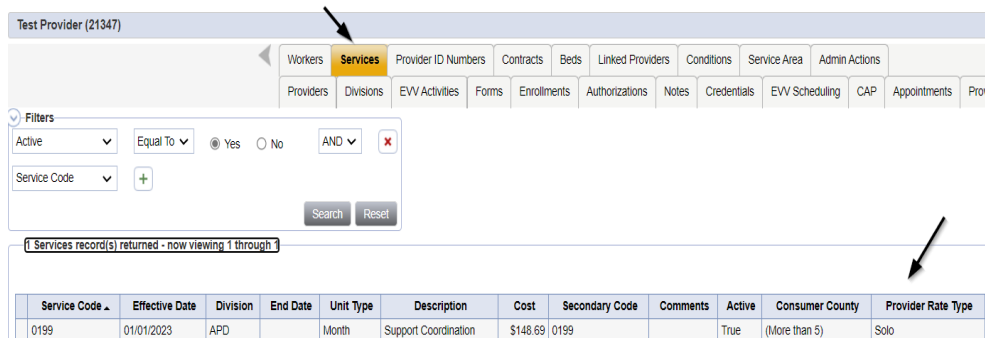
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click Go.



3. Navigate to the **Providers > Services** tab.



4. Select the services that are defined at a solo rate via the hyperlink for that record.



5. In the Services record, update the following field:

- a. "Service End Date" = *Service End date is the day before the effective date of the Final APD iBudget Waiver Sign-Off Form*

Service	
ServiceID *	5629
Service Code	0199
Division *	APD
Unit Type	Month
Service Description	Support Coordination
Secondary Code *	0199
Active Date *	01/01/2023
Service End Date	05/15/2023

6. When finished, click **File > Save and Close Services**

File



7. Repeat steps 4 – 6 for ALL solo services.

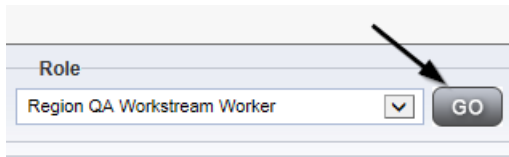
Add New Services

The QA Workstream Worker will add new services at the Agency rate.

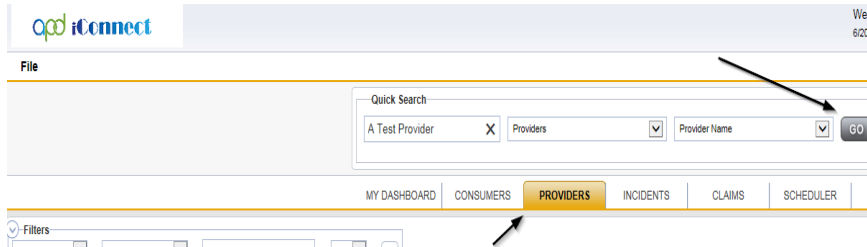
If this expansion request is in conjunction with a Behavior Focused, Intensive Behavioral, Enhanced Intensive Behavior or Medical Enhanced Intensive Behavior service level designation, the QA Workstream Worker will need to add the services, but disable the “active” checkbox. Additionally, the Active date will need to be in the future to allow time for the designation approval.

A screenshot of a software form for adding a new service. The form includes fields for Service ID (5740), Service Code (0998-BasD), Division (APD), Unit Type (Day), Service Description (Residential Habilitation Child - Basic (day)), Secondary Code (0998-BasD), Active Date (07/01/2023), Service End Date, Unit Cost (\$38.00), Start Age, End Age, Require Credentials (unchecked), Provider Rate Type (Agency), Consumer County (dropdown menu showing various Florida counties), Service Ratio (dropdown menu showing values 1.1 to 1.7), and an Active checkbox which is checked.

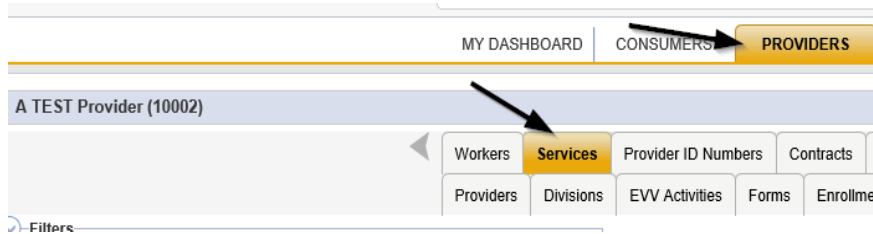
1. Set “Role” = Region QA Workstream Worker then click **Go**.



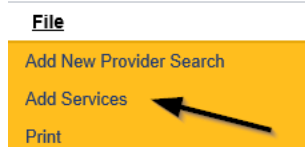
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click Go.



3. Navigate to the **Providers > Services** tab.



4. Select **File > Add Services**.



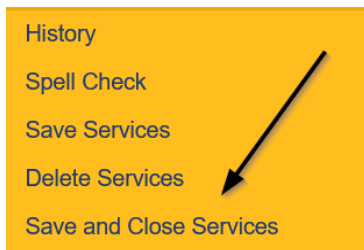
5. In the new Services record, update the following fields:
 - a. "ServiceID" = Select the Approved Agency Service Code
 - b. "Division" = APD
 - c. "Active Date" = the effective date of Final APD iBudget Waiver Sign-Off Form

NOTE: The '0000 – WVR' service code **MUST BE ADDED** for providers to create non-billable notes.

Service	
ServiceID *	<input type="text"/>
Service Code	<input type="text"/>
Division *	<input type="text"/>
Unit Type	<input type="text"/>
Service Description	<input type="text"/>
Secondary Code *	<input type="text"/>
Active Date *	05/15/2023

6. When finished, click **File > Save and Close Services**.

File



8. Repeat steps 4 – 6 to add additional Agency services.

Service Plan Impact

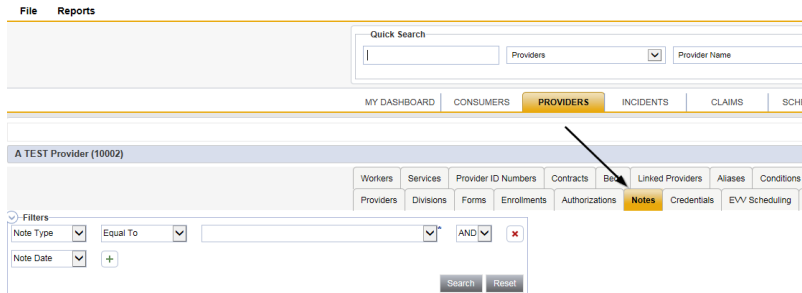


The QA Workstream Worker will notify the Waiver Lead of the Expansion. *The Waiver Workstream Lead will follow the cost planning workflow once they receive this note.*

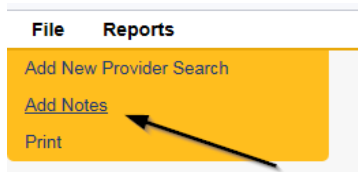
1. Set “Role” = QA Workstream Worker then click **Go**.

A screenshot of a form field labeled 'Role'. The dropdown menu is open, showing 'Region QA Workstream Lead' as the selected option. A black arrow points from the top right towards the 'GO' button.

2. Navigate to the **Providers > Notes** tab.



3. Click **File > Add Notes**.



4. In the new Note record, update the following fields:

- a. "Division" = APD
- b. "Note Type" = Expansion Request
- c. "Note Subtype" = Service Plan Impact
- d. "Associated Form ID#" – Enter Form ID# (e.g., Provider Expansion Request form#)
- e. "Description" = Solo to Agency Expansion with Service Plan Impact
- f. "Note" = Provider ID (solo provider record ID) has expanded to an agency. Please work with WSCs to end all planned services and authorizations at the solo rate and create new planned services/authorizations for the agency rate. Solo rate services will end on the day before the effective date of the Final APD iBudget Waiver Sign-off. Any authorizations not ended prior to that date could result in rejection from FMMIS.
- g. "Status" = Complete
- h. Click the ellipsis on the "Add Note Recipient" to add the [Waiver Workstream Lead](#) as the Note Recipient
- i. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * ← APD

Note By * ← Reed, Monica

Note Date * ← 05/16/2023

Note Type * ← Expansion Request

Note Sub-Type ← Service Plan Impact

Associated Form ID# ← 759

Description ← Solo to Agency Expansion with Service Plan Impact

Note ←

Status * ← Complete

Date Completed ← 05/16/2023

Attachments

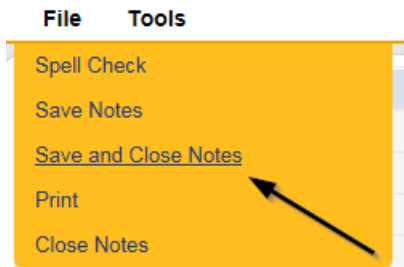
[Add Attachment](#)

Document	Description
There are no attachments to display	

Note Recipients ←

Add Note Recipient: ...

5. When finished click **File > Save and Close Notes**.



For EIN and/or Medicaid ID, the QA Workstream Worker will submit a SARF to deactivate the Solo Provider user account.



For EIN and/or Medicaid ID, the State Office Process Owner will initiate the Provider record closure process for the Solo Provider record.

New Medicaid ID: Generate Initial APD iBudget Waiver Sign-Off Form



When the Service Provider requires a new Medicaid ID, the QA Workstream Worker will generate the Initial APD iBudget Waiver Sign-Off word merge. A note will be created to advise the Provider that a new Medicaid application is going to be needed.

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

A screenshot of a web form showing a dropdown menu for 'Role' with 'Region QA Workstream Worker' selected. A black arrow points to a 'GO' button to the right of the dropdown.

2. Navigate to the **Providers > Forms** tab.

A screenshot of the iConnect web application interface. The 'PROVIDERS' tab is selected in the top navigation bar. Below it, the 'Forms' sub-tab is selected. A search filter is applied: Status: Draft, Equal To, AND. A table below shows a list of forms with columns for 'Division' and 'Form Name'.

Division	Form Name
APD	Group Home Facility Checklist
APD	Group Home Personnel Record Review
APD	Provider Enrollment Application

3. Select **Word Merge > Initial APD iBudget Waiver Sign-Off form**.

A screenshot of a yellow background list of forms. The list includes: CDC Plus Initial Remediation Contact Letter, CDC+ Initial Alert Contact Letter, Final APD iBudget Waiver Sign-Off Form, Initial Alert Contact Letter, Initial APD iBudget Waiver Sign-Off Form, and Initial High Score Contact Letter. A black arrow points to the underlined 'Initial APD iBudget Waiver Sign-Off Form'.

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

File

Generate Merge Document

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

Open Document



5. Save the Word Merge Document to the device by clicking the **Save** button and then **Open**.
6. **Edit** the Word Merge Document as necessary.
 - a. **Designation** = Agency
 - b. **Effective Date of Form** = Enter today's date
 - c. **Expiration Date of Form** = 180 days from Effective Date on the word merge

 iBudget Florida

Initial iBudget Waiver Sign-Off Form

Provider Name: Test Provider

DBA (if applicable):

Group Name (If enrolling as a member of a group): Click or tap here to enter text.

Contact Name: John Test

Applicant Address: 9125 Branchwater Ct Jacksonville, FL 32244

Email Address:

Phone Number:

Designation: Solo: Agency:

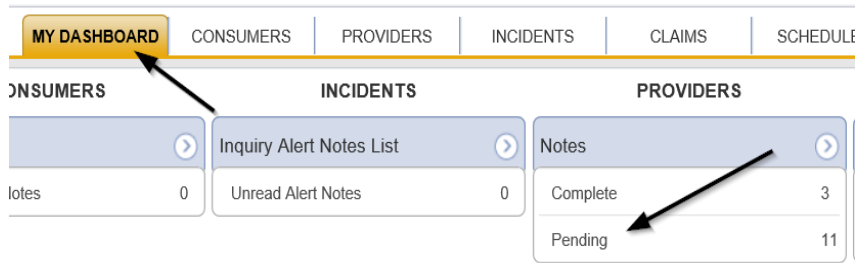
Qualified Organization: WSC of a Qualified Organization:

Home Region: Click to Select Region.

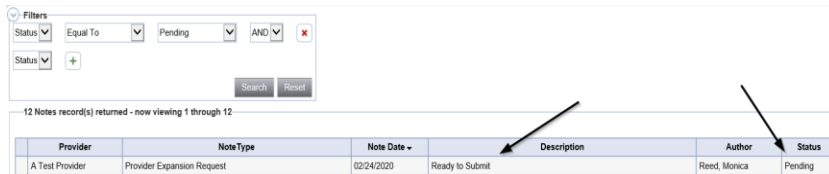
Effective Date of Form: Click or tap to enter a date. Expiration Date of Form: Click or tap to enter a date.



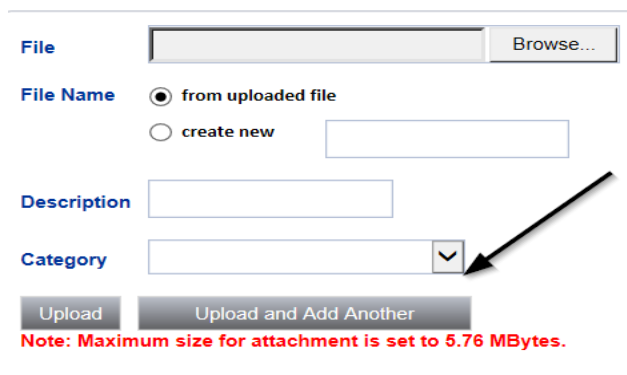
7. When finished with editing the Word Merge Document, click **File > Save as** to save the updated Word Merge to the user's device.
8. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.



9. Select the **Note Type = Provider Expansion Request** and **Description = Ready to Submit** and select the pending record via the hyperlink.



10. In the pending Note record, update the following fields:
 - a. "Note Type" = Leave as Provider Expansion Request
 - b. "Note Subtype" = *Update to Initial APD iBudget Waiver Sign-Off*
 - c. "Description" = *Update to Initial APD iBudget Waiver Sign-Off*
 - d. "Append Text to Note" = Enter notes and add any relevant information.
Advise Service Provider to complete Medicaid Application in the Medicaid Enrollment Portal. They also need to register in My Florida Marketplace in order to complete the agency expansion process.
 - e. "Status" = Leave as *Pending*
 - f. Click "Add Attachment" and search for the Initial APD iBudget Waiver Sign-Off form on the user's device. Click Upload



- g. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
- h. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD ▾

Note By * Reed, Monica

Note Date * 05/16/2023

Associated Form ID# 352

Note Type * Provider Expansion Request ▾

Note Sub-Type Initial APD iBudget Waiver Sign-Off ▾

Description Initial APD iBudget Waiver Sign-Off

Note

New Text

B I U 16px A ▾

Enter notes and add any relevant information

Append Text to Note

Status * Pending ▾

Date Completed

Attachments

Add Attachment

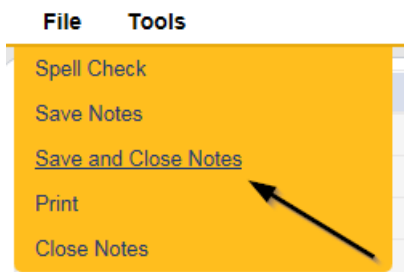
Document

Initial APD iBudget Waiver Sign-Off Form 05152023.docx

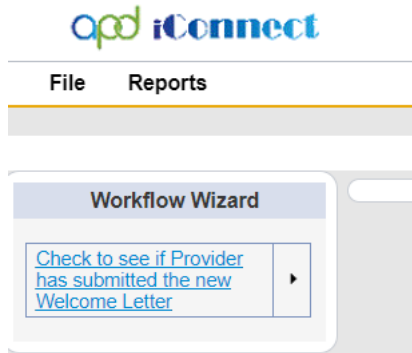
Note Recipients

Add Note Recipient: ... Clear

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



- Upon saving the note, a Workflow Wizard triggered the reminder tickler that is due in 180 calendar days.



- Tickler - "Check to see if Provider has submitted the new Welcome Letter"
- Assigned to the QA Workstream Worker (Monitor 1)
- Due on the **180th** calendar day from the "Provider Expansion Request/Initial APD iBudget Waiver Sign-Off" pending note

- The QA Workstream Worker will access Ticklers via **My Dashboard**.

- Go to **My Dashboard > Providers** and scroll down to the Ticklers Panel. Click on the **Ticklers** link to open the Tickler Queue:

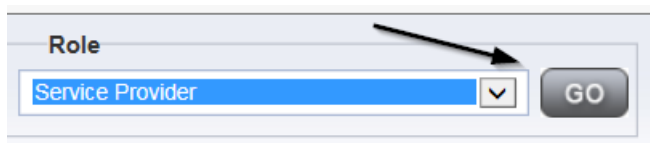


New Medicaid ID: Welcome Letter Received

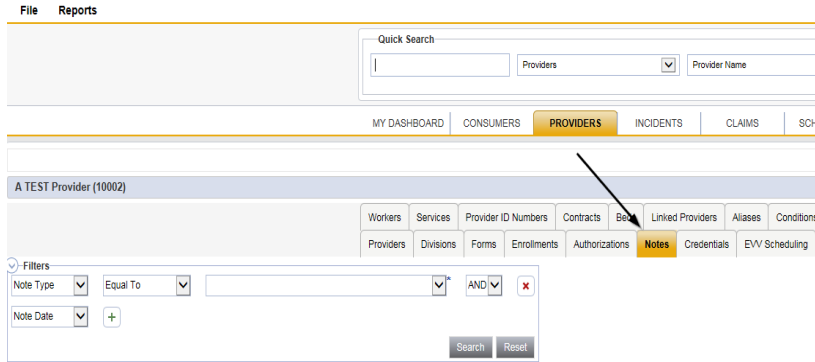


Once the Service Provider receives their Medicaid Welcome Letter, they will attach a copy to a note to inform the QA Workstream Worker. If the Provider did not receive the Welcome letter before the Initial APD iBudget Waiver Sign-off form expires, proceed to [Generate Handbook Denial](#)

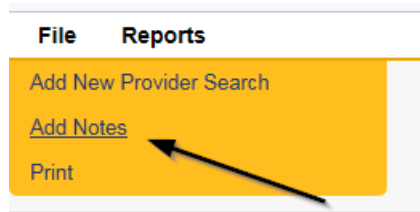
- Set "Role" = Service Provider then click **Go**.



2. Navigate to the **Providers > Notes** tab.

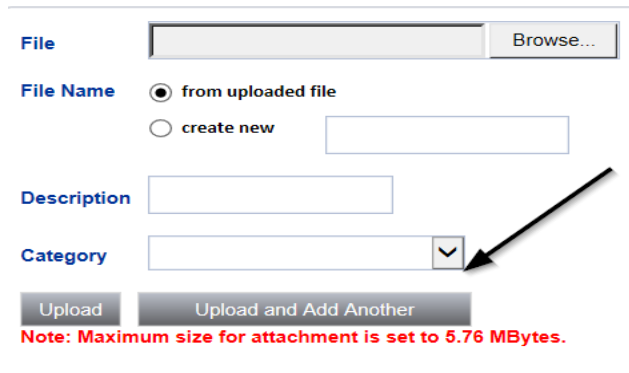


3. Click **File > Add Notes**.



4. In the new Note record, update the following fields:

- a. "Division" = APD
- b. "Note Type" = Provider Expansion Request
- c. "Note Subtype" = Medicaid Welcome Letter
- d. "Description" = Medicaid Welcome Letter
- e. "Note" = Enter notes
- f. "Status" = Complete
- g. Click "Add Attachment" and search for the copy of the Medicaid Welcome Letter on the user's device. Click Upload.



- h. Click the ellipsis on the "Add Note Recipient" to add the *QA Workstream Worker* as the Note Recipient
- i. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 05/16/2023

Note Type * Provider Expansion Request

Note Sub-Type * Medicaid Welcome Letter

Description Medicaid Welcome Letter

Note

Status * Complete

Date Completed 05/16/2023

Attachments

Add Attachment

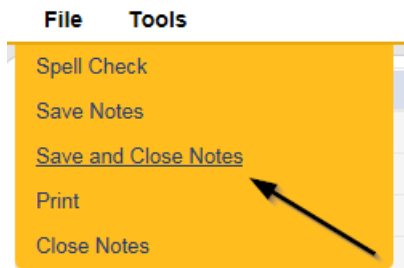
Document	Description
Medicaid Welcome Letter.docx	

Note Recipients

Add Note Recipient: Clear

Name	Date Sent	Date Read
Reed, Monica	5/16/2023	

5. When finished click **File > Save and Close Notes**.



New Medicaid ID: Create New Provider Record



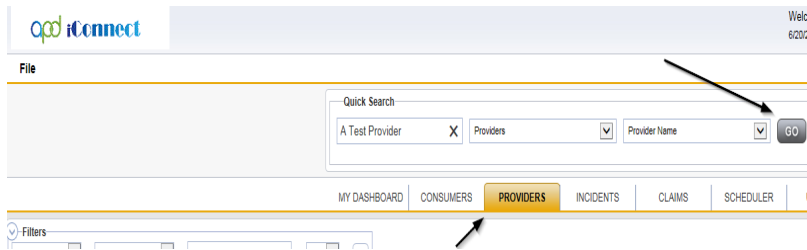
After the Service Provider provides the Welcome letter, the QA Workstream Worker will need to create the **NEW** Agency Provider Record. It will be important to establish a coordinated effective date.

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

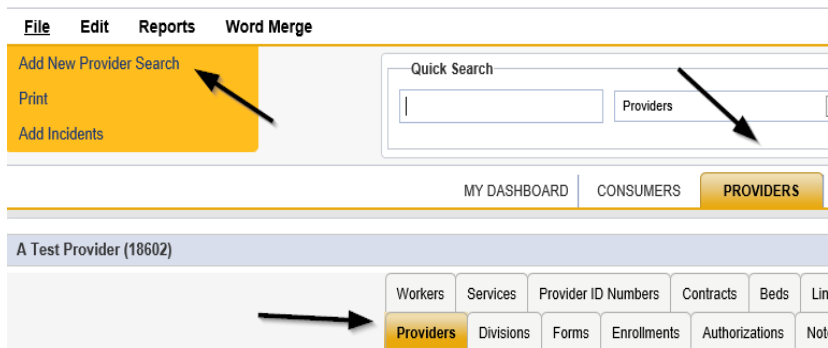
Role

Region QA Workstream Worker

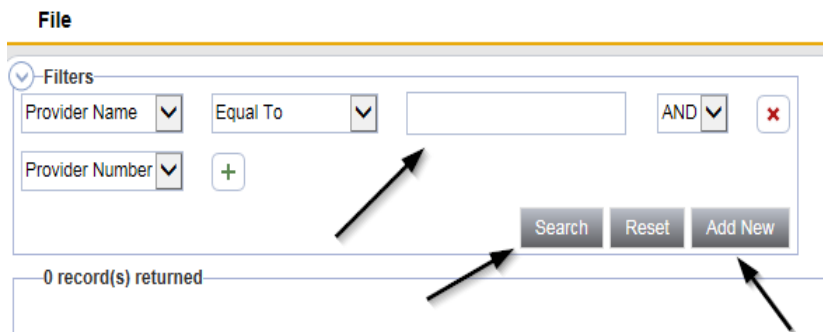
2. Navigate to the **Providers** chapter and enter the Solo Provider's name in the Quick Search filter and click Go.



3. The Provider's record will be displayed. Navigate to the **Providers > Providers** tab then Select **File > Add New Provider Search**.



4. In the Provider Search screen, update the following fields:

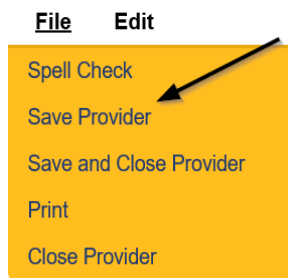


- a. Provider Name = Enter the New Provider Name and Click **Search**. If no records returned, click **Add New**.
5. On the Provider Detail Screen, add at a minimum the following fields. Complete as much information as possible for the remaining fields:
 - a. "Initial Division" = APD
 - b. "Provider Name" = Enter New Agency Provider Name
 - c. "APD Vendor Number" = FEIN0001
 - d. "Active" = will default to enabled
 - e. "Medicaid Provider ID" = Medicaid ID if available

- f. "Exclude from Selection" = Enable this checkbox
- g. "Specialist/Liaison" = QA Workstream Worker assigned to this Provider

Basic Information			
Initial Division *	APD	Residential Monitor	
Provider Name *	Test Provider	Licensing Specialist	
DBA (if applicable)/Facility Name		Area Behavior Analyst	
APD Vendor Number	FEIN0001	Group Home/ADT # of workers	
WSC QO		Provider SSN	
Active *	<input checked="" type="checkbox"/>	Medicaid Provider ID	123456
Provider Type		Provider EIN	
Exclude from Selection	<input checked="" type="checkbox"/>	Licensed Facility	
Specialist/Liaison	Reed, Monica	Presumptively Institutional	<input type="checkbox"/>

6. When finished, click **File > Save Provider**.



- 7. The Division Details page will be displayed. Update the following fields:
 - a. "Disposition" = Open
 - b. "Open Date" = Enter Date

Division Details	
Division *	APD
Disposition *	Open
Open Date	05/15/2023

8. Select **File > Save and Close Division**.





The QA Workstream Worker will need to submit a SARF to add the Provider worker to the New Agency Provider record.

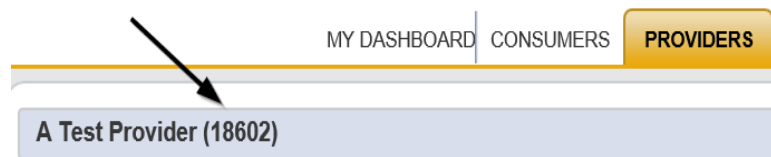
New Medicaid ID: Add Sender ID



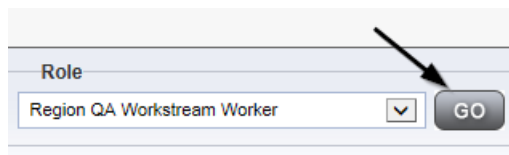
The QA Workstream Worker will add the new Sender ID in the **NEW** Agency Provider record. The format for the SenderID is the iConnect ID plus the first 5 characters of the Provider name (i.e., 18602_A TES). The SenderID is used in XML files for Providers who opt to use the External Provider Interface.



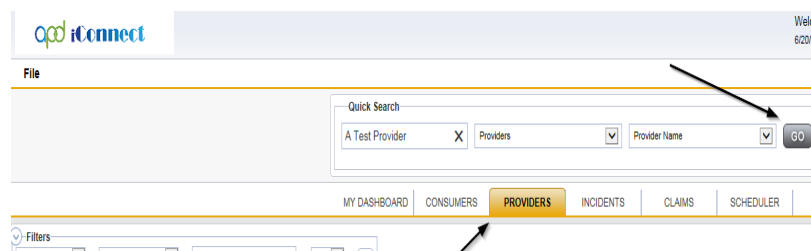
The iConnect ID is located next to the Provider Name on the Provider > Providers tab



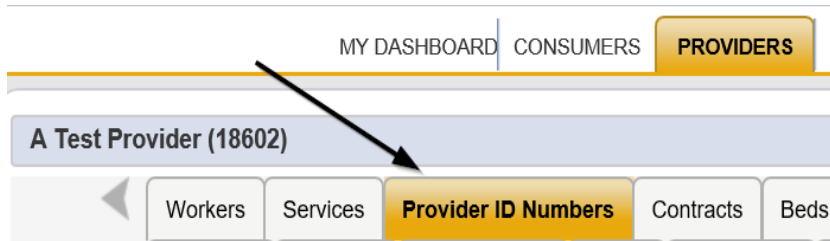
1. Set "Role" = Region QA Workstream Worker then click **Go**.



2. Navigate to the **Providers** chapter and enter the **NEW** Agency Provider's name in the Quick Search filter and click Go.

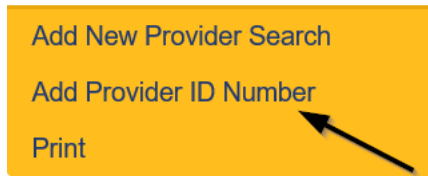


- Navigate to the **Providers > Provider ID Numbers** tab.



- Select **File > Add Provider ID Numbers**.

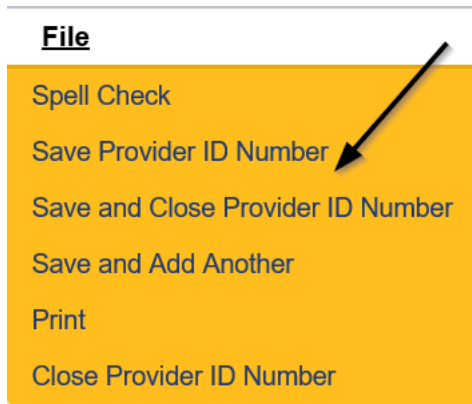
File



- Update the Provider ID Number Details page for the following fields:
 - "Division" = APD
 - "Identifier" = Enter format of iConnect ID plus first 5 characters of the Provider Name in capital letters (e.g., 18602_A TES)
NOTE: Spaces count as characters.
 - "Start Date" = enter today's date
 - "End Date" = Leave blank
 - "Type" = SenderID
 - "Status" = Active

Provider ID Number	
Division *	APD ▼
Identifier *	18602_A TES X
Start Date *	02/26/2020
End Date	
Type	SenderID ▼
Category	
Active	<input checked="" type="checkbox"/>

- When finished, click **File > Save and Close Provider ID Number**

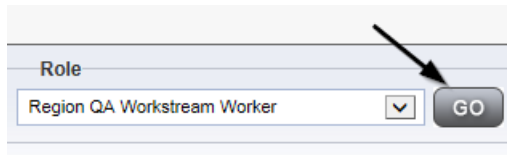


New Medicaid ID: Generate MWSA

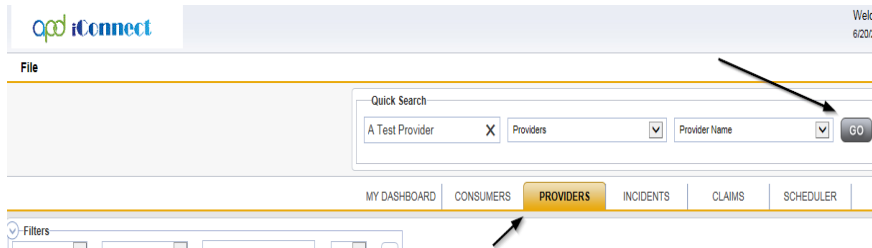


The QA Workstream Worker will generate the blank MWSA word merge from the **NEW** Agency Provider record, save it to their device, edit as appropriate, and attach it to a note in the **OLD** Solo Provider record so it will be visible to the provider.

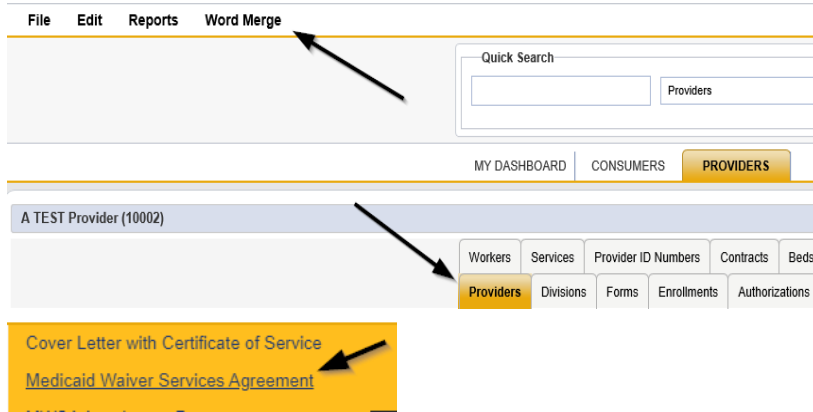
- Set "Role" = Region QA Workstream Worker then click **Go**.



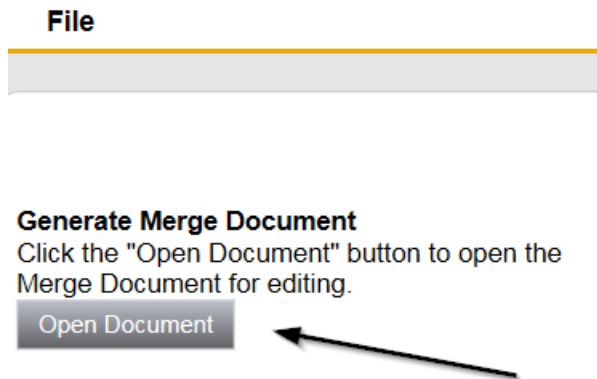
- Navigate to the **Providers** chapter and enter the **NEW** Agency Provider's name in the Quick Search filter and click Go.



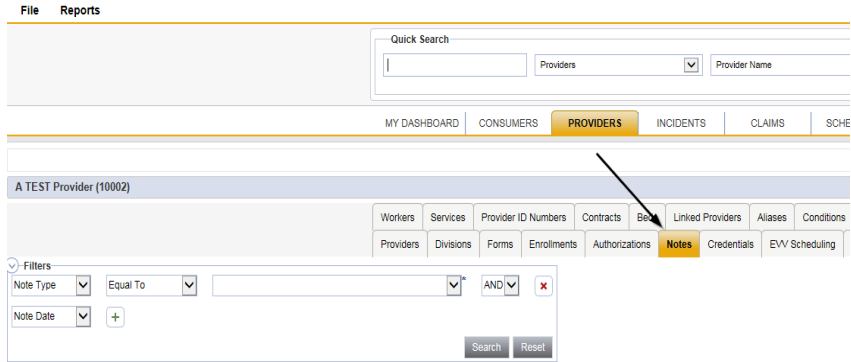
- Navigate to the **Providers > Providers** tab and Select **Word Merge > Medicaid Waiver Service Agreement**.



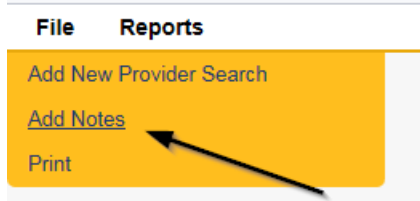
4. Select **Open Document** to open the Word Merge document for editing.



6. **Edit** the Word Merge Document as necessary.
Note the effective date. This is the date used on the SARF, credential, license and service records.
7. 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.
8. Navigate to the *OLD* Solo Provider’s record. Select the **Providers > Notes** tab.

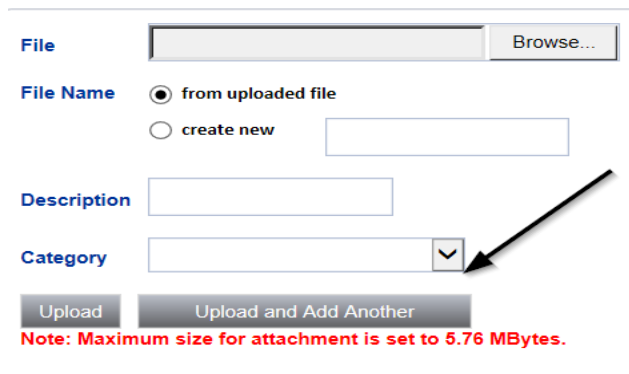


9. Click **File > Add Notes**.



10. In the new Note record on the *OLD* Solo Provider record, update the following fields:

- a. "Division" = APD
- b. "Note Type" = Provider Expansion Request
- c. "Note Subtype" = MWSA Pending Provider Signature
- d. "Associated Form ID#" = Enter Form ID# if applicable
- e. "Description" = Solo to Agency Expansion MWSA Pending Provider Signature
- f. "Note" = Enter "Please print the attached MWSA and sign"
- g. "Status" = Pending
- h. Click "Add Attachment" and search for MWSA on the user's device. Click Upload



- i. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient

- j. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD ▾

Note By * Reed, Monica ▾

Note Date * 05/16/2023

Associated Form ID#

Note Type * Provider Expansion Request ▾

Note Sub-Type MWSA Pending Provider Signature ▾

Description Solo to Agency Expansion MWSA Pending Provider Signature

Note

Status * Pending ▾

Date Completed

Attachments

Add Attachment

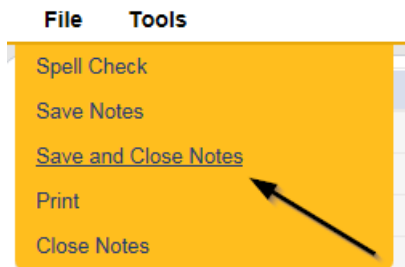
Document	Description
MWSA.docx	

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read
Reed, Monica	5/16/2023	

11. When finished click **File > Save and Close Notes**.



New Medicaid ID: Provider Signed MWSA



The Service Provider will print out the MWSA, sign, scan and save an electronic copy to their device and then attach it back to the pending note in the *OLD* Solo Provider Record.

1. Set "Role" = Service Provider then click **Go**.

2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

3. Select the **Note Type = Provider Expansion Request** and **Description = MWSA Pending Provider Signature** and select the pending record via the hyperlink.

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

Provider	Note Type	Note Date	Description	Auth	Status
Reed Group Home	Expansion Request	02/25/2020	Progress Note	Reed, Monica	Pending
Reed Group Home	Provider Expansion Request	02/25/2020	MWSA Pending Provider Signature	Reed, Monica	Pending

4. Click on the attachment within the MWSA Pending Provider Signature note and then click **Open** on the pop-up message box.

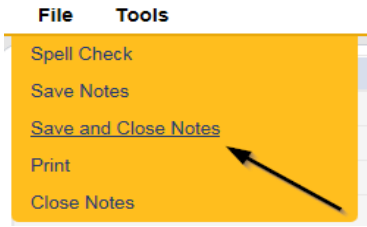
5. Select **File > Print** within the Word Document
6. The Service Provider will sign the hard copy and attach it to the pending note
7. In the pending Note record in the **OLD** Solo Provider record, update the following fields:
 - a. "Note Type" = Provider Expansion Request
 - b. "Note Subtype" = *Update to Provider Signature*
 - c. "Description" = *Update to Provider Signature*
 - d. "Append Text to Note" = Enter notes

- e. "Status" = *Update to Complete*
- f. Click "Add Attachment" and search for the copy of the Provider signed MWSA on the user's device. Click Upload.

- g. Click the ellipsis on the "Add Note Recipient" to add the *QA Workstream Worker* as the Note Recipient
- h. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Name	Date Sent	Date Read
Reed, Monica	05/16/2023	

- When finished click **File > Save and Close Notes**.

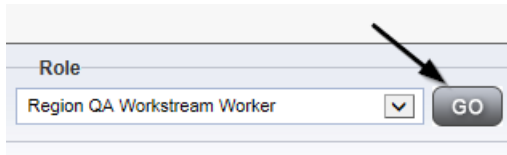


New Medicaid ID: Final APD iBudget Waiver Sign-Off Form

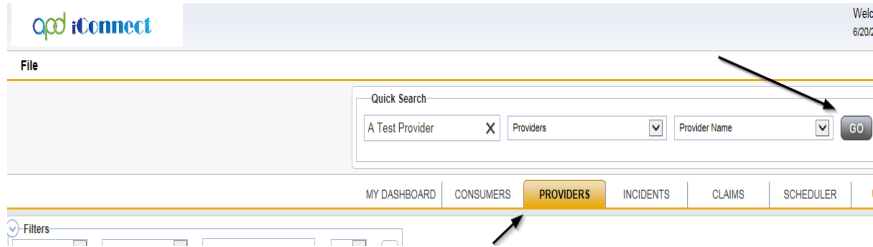


The QA Workstream Worker will generate the Final APD iBudget Waiver Sign-off form from the **NEW** Agency Provider record.

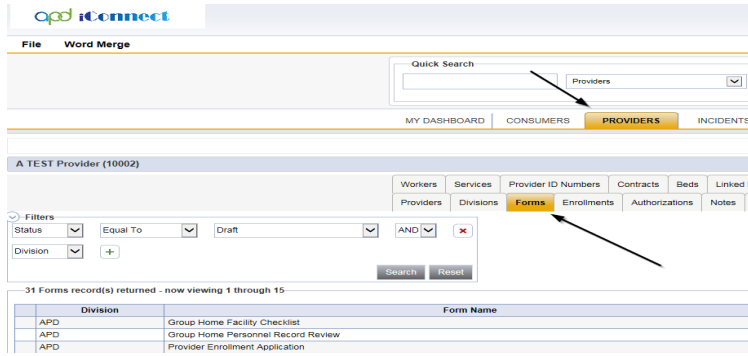
- Set "Role" = Region QA Workstream Worker then click **Go**.



- Navigate to the **Providers** chapter and enter the **NEW** Agency Provider's name or ID in the Quick Search filter and click Go.

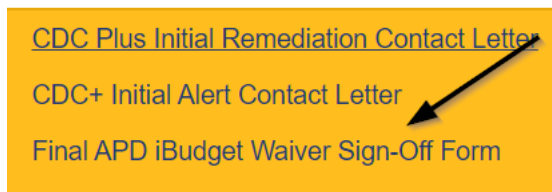


- The **NEW** Agency Provider's record will display. Navigate to the **Providers > Forms** tab.



4. Select **Word Merge > Final APD iBudget Waiver Sign-Off Form.**

Word Merge



5. Generate the Word Merge and set the effective date to at least be a *minimum of 10 calendar days AND the first day of a future month* then Save to the user’s device.

Final iBudget Waiver Sign-Off Form

Provider Name: Test Provider

DBA (if applicable):

Contact Name: John Test

Provider Address: 9125 Branchwater Ct Jacksonville, FL 32244

Email Address:

Phone Number:

Designation: Solo: Agency:
 Qualified Organization: WSC of a Qualified Organization:

Home Region: Click to Select Region.

Approved Regions: Northwest Northeast Central Suncoast Southeast Southern

9 Digit Medicaid ID: FL545454

Effective Date of form: Click or tap to enter a date.

- This form will be attached to the ROM Review note later in the workflow.

New Medicaid ID: ROM Review



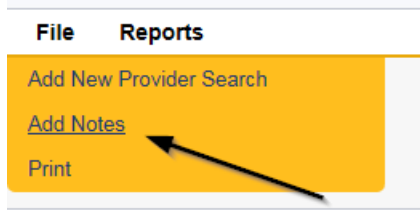
Once the Provider signed MWSA has been received by the QA Workstream Worker they will review the signed MWSA and FMMIS Enrollment screen for accuracy prior to sending to the ROM. The QA Workstream Worker will save a copy to their device and then attach it to a new note for ROM Review in the **NEW** Agency Provider Record along with the Final APD iBudget Waiver Sign-off form.

- Set "Role" = Region QA Workstream Worker then click **Go**.

- Navigate to the **Providers** chapter and enter the **NEW** Agency Provider's name or ID in the Quick Search filter and click Go.

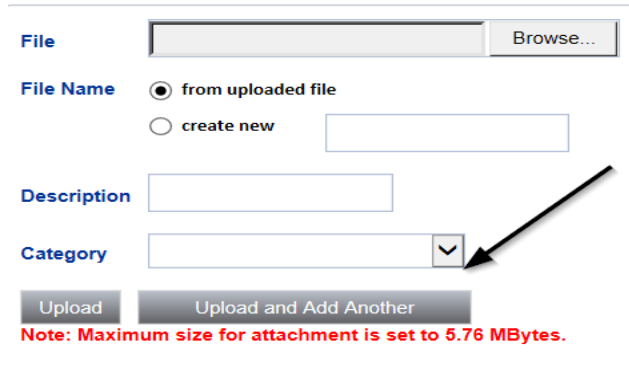
- The **NEW** Agency Provider's record will display. Navigate to the **Providers > Notes** tab

4. Click **File > Add Notes**



5. Update the following fields on the Notes Detail Screen

- a. "Division" = APD
- b. "Note Type" = Expansion Request
- c. "Note Subtype" = ROM Review
- d. "Associated Form ID#" = Enter Form ID# (e.g., Provider Expansion Form ID#)
- e. "Description" = ROM Review
- f. "Note" = Enter notes
- g. "Status" = Complete
- h. Click "Add Attachment" and search for the copy of the Provider signed MWSA on the user's device. Click Upload and Add another to attach the Final APD iBudget Waiver Sign-Off form



- i. Click the ellipsis on the "Add Note Recipient" to add the *ROM/Designee* as the Note Recipient
- j. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 05/15/2023

Note Type * Expansion Request

Note Sub-Type * ROM Review

Associated Form ID# 704

Description ROM Review

Note

Status * Complete

Date Completed 05/15/2023

Attachments

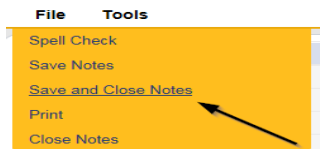
Add Attachment

Document	Description
FINAL APD iBudget Waiver Sign-Off Form.pdf	Word Template: Final APD iBudget Waiver Sign-Off Form

Note Recipients

Add Note Recipient: Clear

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



New Medicaid ID: ROM MWSA Signature/Approval



The ROM/DROM will print, sign, scan and attach the executed MWSA and Final APD iBudget Waiver Sign-Off form and then attach it to a new note in the **NEW** Agency Provider record. The Service Provider will be notified via this note.

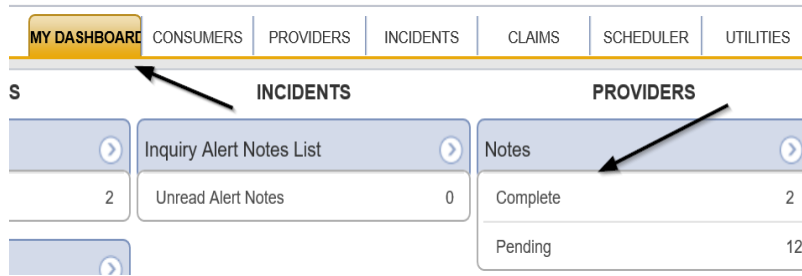
1. Set "Role" = ROM/Deputy ROM then click **Go**.

Role

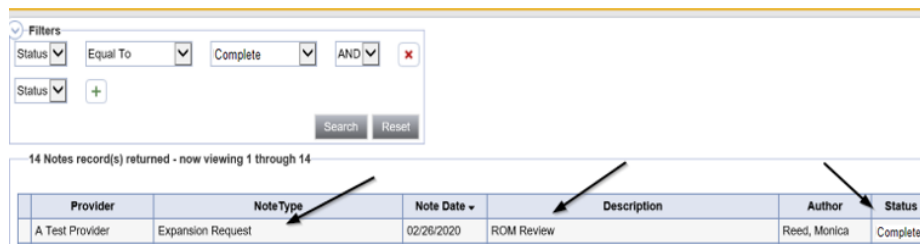
ROM/Deputy ROM

GO

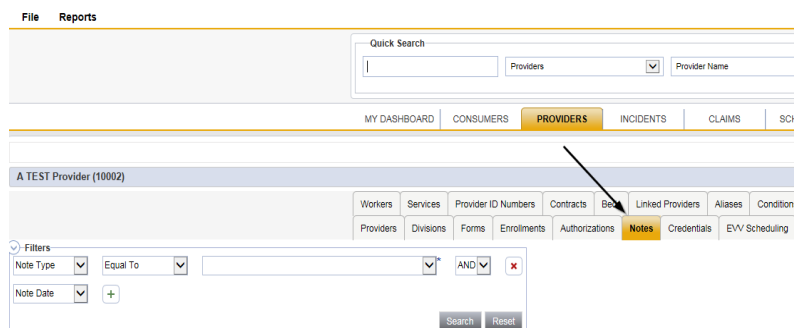
2. Navigate to the **My Dashboard > Providers > Notes > Complete** and click the hyperlink for the Complete notes



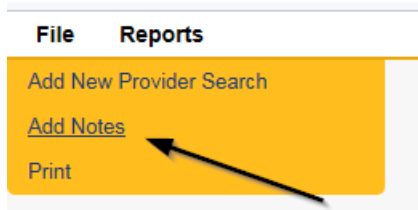
3. Select the **Note Type = Expansion Request** and **Description = ROM Review** and select the record via the hyperlink



4. Click and Open the MWSA and Final APD iBudget Waiver Sign-Off attachments within the ROM Review note
5. Select **File > Print** within each of the documents
6. The ROM/Designee will sign the hard copies, scan and save an electronic copy to a specified folder on their device. They will then add a new note and attach the signed forms
7. Navigate to the **Providers > Notes** tab.



8. Click **File > Add Notes**.



9. Update the following fields on the Notes Detail Screen

- a. "Division" = APD
- b. "Note Type" = Provider Expansion Request
- c. "Note Subtype" = MWSA ROM Approval
- d. "Associated Form ID#" = Enter Form ID# (e.g., Provider Expansion Form ID#)
- e. "Description" = MWSA ROM Approval
- f. "Note" = Enter notes
- g. "Status" = Complete
- h. Click "Add Attachment" and search for the copy of the ROM signed MWSA on the user's device. Click Upload and Add another to attach the ROM Signed Final APD iBudget Waiver Sign-Off form

A screenshot of a form titled 'Notes Detail Screen'. It has several fields: 'File' with a 'Browse...' button; 'File Name' with radio buttons for 'from uploaded file' (selected) and 'create new' followed by a text input; 'Description' with a text input; and 'Category' with a dropdown menu. An arrow points to the dropdown arrow of the 'Category' field. At the bottom are 'Upload' and 'Upload and Add Another' buttons, and a red note: 'Note: Maximum size for attachment is set to 5.76 MBytes.'

- i. Click the ellipsis on the "Add Note Recipient" to add the [QA Workstream Worker](#) as the Note Recipient
- j. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note
- k. Click the ellipsis on the "Add Note Recipient" to add the [Service Provider](#) as the Note Recipient
- l. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division *

Note By *

Note Date *

Associated Form ID#

Note Type *

Note Sub-Type

Description

Note

B I U 16px A

Status *

Date Completed

Attachments

[Add Attachment](#)

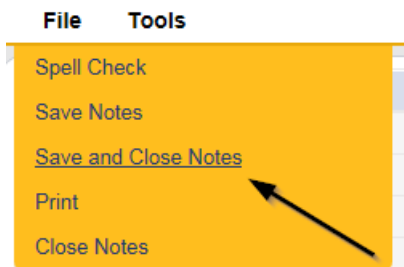
Document	Description
Signed MWSA	
Signed Final APD iBudget	

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read
Reed, Monica	5/16/2023	

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



New Medicaid ID: End Solo Certification Record

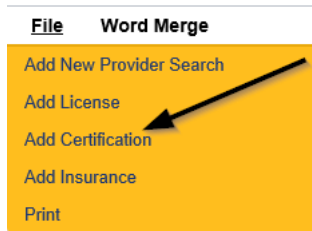


The QA Workstream Worker will close the Solo Certification record in the *Old* Solo Provider record.

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

A screenshot of a web form showing a dropdown menu for "Role" with "Region QA Workstream Worker" selected. A black arrow points to a grey "GO" button to the right of the dropdown.

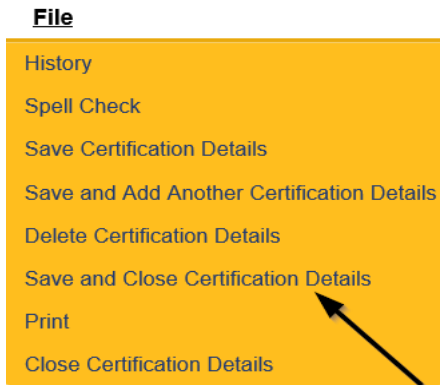
2. Navigate to the *Old* Solo Provider record > **Providers** > **Credentials** tab and select **File** > **Add Certification**.



3. Update the Certification Details page for the following fields:
 - a. "Certification Type" = *iBudget Waiver Solo Provider*
 - b. "Effective Date" = no change
 - c. "Expiration Date" = enter as *the day before the effective date of the Final APD iBudget Waiver Sign-Off form*
 - d. "Comment" New Medicaid ID Due to Solo Agency Expansion
 - e. "Status" = Expansion/Closed
 - f. "QA Workstream Worker" = Worker name that is updating the Certification record

A screenshot of the "Certification Details" form. Fields include: Credential Type (Certification), Certification Type (iBudget Waiver Solo Provider), Effective Date (04/01/2023), Expiration Date (05/14/2023), Comment (New Medicaid ID Due to Solo Agency Expansion), Status (Expansion/Closed), and QA Workstream Worker (Reed, Monica). Arrows point to the Expiration Date, Comment, and Status fields.

- When finished, click **File > Save and Close Certification Details**.

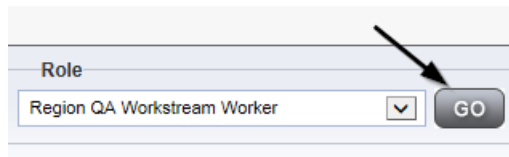


New Medicaid ID: End Solo Services

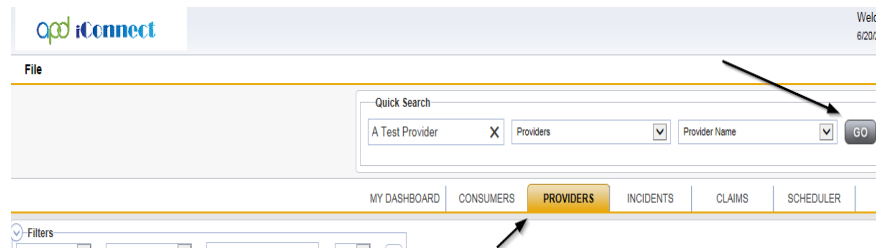


The QA Workstream Worker will end services for the *OLD* Solo Provider record at the solo rate.

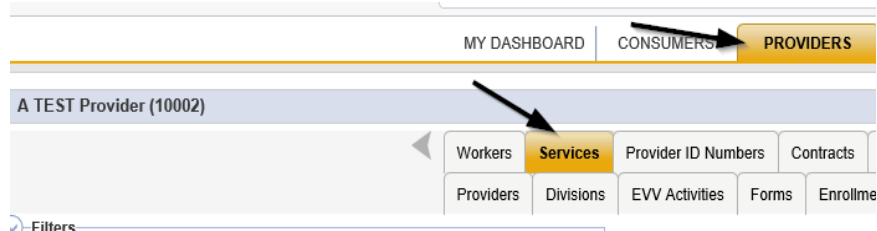
- Set "Role" = Region QA Workstream Worker then click **Go**.



- Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click Go.



- Navigate to the **Providers > Services** tab.



4. Select the services that are defined at a solo rate via the hyperlink for that record.

Test Provider (21347)

Workers **Services** Provider ID Numbers Contracts Beds Linked Providers Conditions Service Area Admin Actions

Providers Divisions EVW Activities Forms Enrollments Authorizations Notes Credentials EVW Scheduling CAP Appointments Pro

Filters

Active Equal To Yes No AND X

Service Code +

Search Reset

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

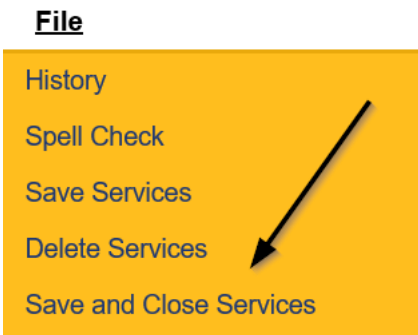
Service Code	Effective Date	Division	End Date	Unit Type	Description	Cost	Secondary Code	Comments	Active	Consumer County	Provider Rate Type
0199	01/01/2023	APD		Month	Support Coordination	\$148.69	0199		True	(More than 5)	Solo

5. In the Services record, update the following field:

- "Service End Date" = Service End date is *the day before the effective date of the Final APD iBudget Waiver Sign-Off Form*

Service	
ServiceID *	5629
Service Code	0199
Division *	APD
Unit Type	Month
Service Description	Support Coordination
Secondary Code *	0199
Active Date *	01/01/2023
Service End Date	05/15/2023

6. When finished, click **File > Save and Close Services**.



6. Repeat steps 4 – 6 for ALL solo services.

New Medicaid ID: Close Solo Provider Record



The QA Workstream Worker will send a note to the State Office Process Owner requesting the *OLD* Solo Provider record be closed.

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

A screenshot of a web form showing a dropdown menu for "Role" with "Region QA Workstream Worker" selected. A black arrow points to a "GO" button to the right of the dropdown.

2. Navigate to the **Providers > Notes** tab.

A screenshot of a web application interface. At the top, there are tabs for "MY DASHBOARD", "CONSUMERS", "PROVIDERS", "INCIDENTS", "CLAIMS", and "SCHE". The "PROVIDERS" tab is active. Below the tabs, there is a search bar and a list of providers. One provider is highlighted: "A TEST Provider (10002)". Below the provider list, there are several sub-tabs: "Workers", "Services", "Provider ID Numbers", "Contracts", "Benefits", "Linked Providers", "Aliases", "Conditions", "Providers", "Divisions", "Forms", "Enrollments", "Authorizations", "Notes", "Credentials", and "EVV Scheduling". The "Notes" sub-tab is highlighted. A black arrow points to the "Notes" sub-tab.

3. Click **File > Add Notes**.

A screenshot of a web application interface showing a "File" menu. The menu items are "Add New Provider Search", "Add Notes", and "Print". A black arrow points to the "Add Notes" menu item.

4. In the new Note record, update the following fields:
 - a. "Division" = APD
 - b. "Note Type" = Provider Expansion Request
 - c. "Note Subtype" = Close Provider Record
 - d. "Associated Form ID#" = Leave blank
 - e. "Description" = Closed Old Solo Provider Record
 - f. "Note" = Request closure of the Old Solo Provider record with an end date of the day before the start date of the Final APD iBudget Waiver Sign Off form.
 - g. "Status" = Complete

- h. Click the ellipsis on the "Add Note Recipient" to add the *State Office Process Owner* as the Note Recipient
- i. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 05/18/2023

Note Type * Provider Expansion Request

Note Sub-Type * Close Provider Record

Associated Form ID#

Description * Close Old Solo Provider Record

Note * Request closure of the Old Solo Provider record with an end date of the day before the start date of the Final APD iBudget Waiver Sign Off form.

Status * Complete

Date Completed 05/18/2023

Attachments

[Add Attachment](#)

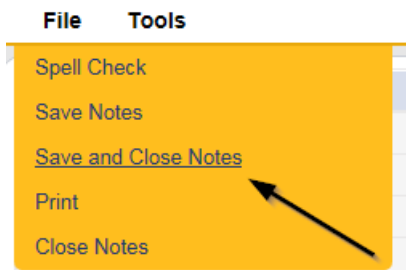
Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	
Buck, Jennifer	5/18/2023		Unread		Remove

5. When finished click **File > Save and Close Notes.**



New Medicaid ID: Add Agency Certification Record



The QA Workstream Worker will add the iBudget Waiver Agency certification record in the *NEW* Agency Provider record.

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

Role
Region QA Workstream Worker [v] GO

2. Navigate to the **Providers > Credentials** tab and select **File > Add Certification**.

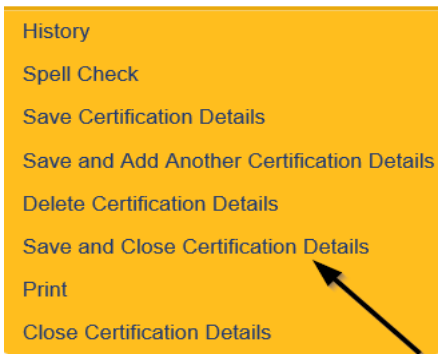
File Word Merge
Add New Provider Search
Add License
Add Certification
Add Insurance
Print

3. Update the Certification Details page for the following fields:
 - a. "Certification Type" = *iBudget Waiver Agency Provider*
 - b. "Effective Date" = enter the effective date as *the date on the Final APD iBudget Waiver Sign-Off form*
 - c. "Expiration Date" = Leave blank
 - d. "Comment" = New Medicaid ID Due to Solo Agency Expansion
 - e. "Status" = Active
 - f. "QA Workstream Worker" = Worker name that is updating the Certification record

Certification Details	
Credential Type *	Certification
Certification Type	<i>iBudget Waiver Agency Provider</i> [v]
Effective Date	08/01/2019 [calendar]
Expiration Date	08/31/2019 [calendar]
Comment	
Status	Active [v]
QA Workstream Worker	Reed, Monica [dropdown] [Clear]

4. When finished, click **File > Save and Close Certification Details**.

File



When a new Medicaid ID is required, the QA Workstream Worker (QA Workstream Worker) will complete the process to deactivate the user account for the old solo account and create the new user account through the SARF process.

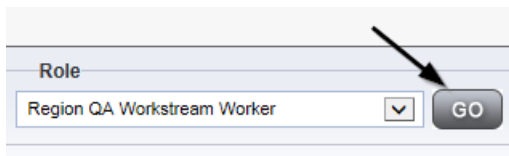
New Medicaid ID: Add Provider License Record



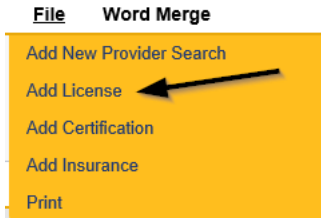
The QA Workstream Worker will follow the standard process for creating a User Access Request for the business owner/designee outside of APD iConnect.

User access request needs to be completed including the face-to-face visit (e.g., video or in person identity verification) by the QA Workstream Worker who will also add the MWSA license information in the *NEW* Agency Provider record.

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



2. Navigate to the **Providers > Credentials** tab **File > Add License**.



3. Update the following fields:

- a. "License Type" = MWSA
- b. "Effective Date" = enter the effective date of the Final APD iBudget Waiver Sign-Off form
- c. "Expiration Date" = enter the end date
- d. "Comment" = if applicable
- e. "Status" = Active
- f. "Reason" = Expansion
- g. "QA Workstream Worker" = Worker name that is adding the License record



File

License Details

Credential Type *	License
License Type * ←	MWSA
Effective Date * ←	05/01/2023
Expiration Date * ←	05/31/2024
Less than One Year	<input type="checkbox"/>
Comment	
Status ←	Active
Reason ←	Expansion
QA Workstream Worker ←	Reed, Monica

... Clear Details

4. When finished, click **File > Save and Close License Details.**

File

- History
- Spell Check
- Save License Details
- Save and Add Another License Details
- Delete License Details
- Save and Close License Details
- Print
- Close License Details

New Medicaid ID: Add Agency Services

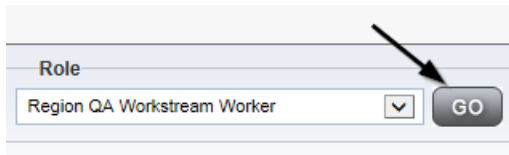
The QA Workstream Worker will add new services for the new service expansion on the **NEW** Agency Provider record.

If this expansion request is in conjunction with a Behavior Focused, Intensive Behavioral, Enhanced Intensive Behavior or Medical Enhanced Intensive Behavior service level designation, the QA Workstream Worker will need to add the services, but disable the “active” checkbox. Additionally, the Active date will need to be in the future to allow time for the designation approval.

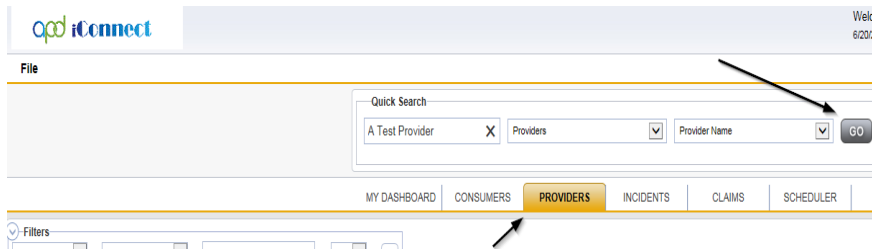


Service	
ServiceID *	5740
Service Code	0998-BasD
Division	APD
Unit Type	Day
Service Description	Residential Habilitation Child - Basic (day)
Secondary Code *	0998-BasD
Active Date *	07/01/2023
Service End Date	
Unit Cost *	\$38.80
Start Age	
End Age	
Require Credentials	<input type="checkbox"/>
Provider Rate Type *	Agency
Consumer County	ABBEVILLE ACADIA ACCOMACK ADA ADAIR ADAMS
Service Ratio	1.1 1.2 1.4 1.3 1.5 1.6 1.7
Agency	ALACHUA BAKER BAY BRADFORD BREWARD CALHOUN CHARI OTTE
Active	<input checked="" type="checkbox"/>

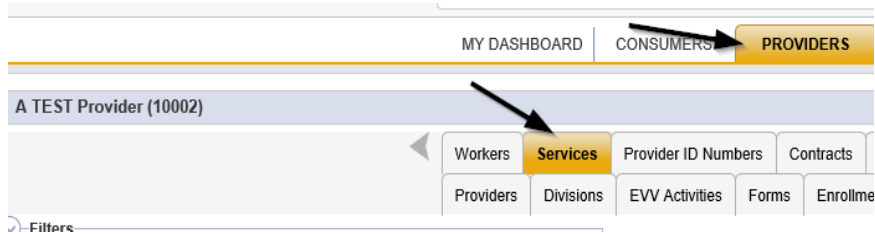
1. Set “Role” = Region QA Workstream Worker then click **Go**.



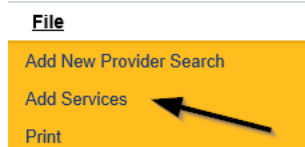
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click Go.



3. Navigate to the **Providers > Services** tab.



4. Select **File > Add Services**.



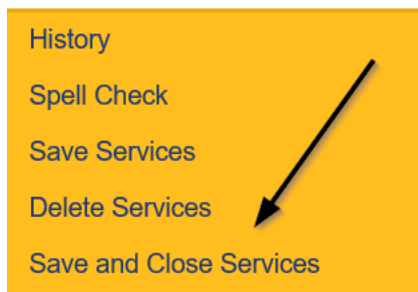
5. In the new Services record, update the following fields:
 - a. "ServiceID" = Select the Approved Agency Service Code
 - b. "Division" = APD
 - c. "Active Date" = the effective date of Final APD iBudget Waiver Sign-Off Form

NOTE: The '0000 – WVR' service code **MUST BE ADDED** for providers to create non-billable notes.

Service	
ServiceID *	<input type="text"/>
Service Code	<input type="text"/>
Division *	<input type="text" value="v"/>
Unit Type	<input type="text"/>
Service Description	<input type="text"/>
Secondary Code *	<input type="text"/>
Active Date *	<input type="text" value="05/15/2023"/>

6. When finished, click **File > Save and Close Services**.

File



7. Repeat Steps 4 – 6 for each Agency service.



Proceed to [Service Plan Impact](#)

New Medicaid ID: Activate New Agency Provider Record

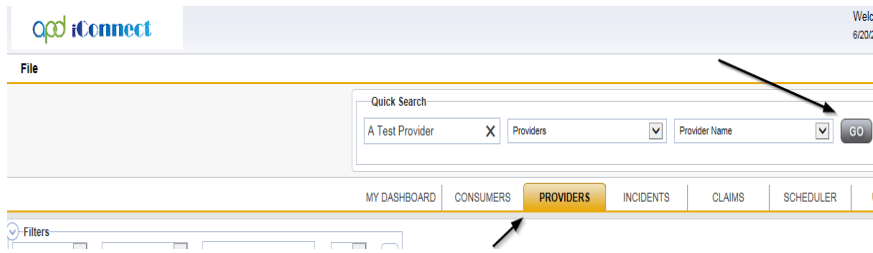


The QA Workstream Worker will update the Exclude from Selection checkbox so that the Service Provider is now available and active in the **NEW** Agency Provider record.

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

Role	<input type="text" value="Region QA Workstream Worker"/> <input type="text" value="v"/>	<input type="button" value="GO"/>
------	---	-----------------------------------

2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click Go.



3. Navigate to the **Providers > Providers** tab.



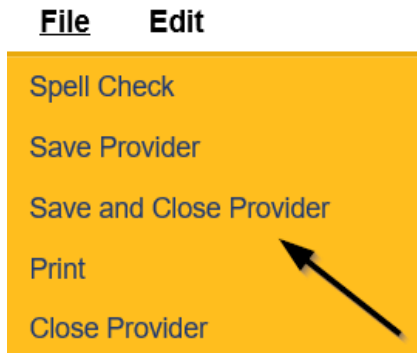
4. Click **Edit > Edit Provider**.



5. Click **Edit > Edit Provider** and disable the Exclude from Selection checkbox.

Basic Information	
Provider Name *	Test Provider
DBA (if applicable)/Facility Name	
APD Vendor Number	
WSC QO	
Active *	<input checked="" type="checkbox"/>
Provider Type	Licensed Home [GR] ▾
Exclude from Selection	<input type="checkbox"/>
Specialist/Liaison	Reed, Monica ▾
Residential Monitor	

6. When finished, Click **File > Save and Close Provider**.



As Needed: Request Not Complete



The QA Workstream Worker will review the Solo Provider record (Expansion Request Form, Notes, and any other pertinent tabs) to ensure provider meets minimum handbook requirements. If the Provider expansion request is not complete, they will respond to the Ready to Submit Pending note to advise the Service Provider.

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

2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

3. Select the **Note Type = Provider Expansion Request** and **Description = Ready to Submit** and select the pending record via the hyperlink.

Provider	Note Type	Note Date	Description	Author	Status
A Test Provider	Provider Expansion Request	02/24/2020	Ready to Submit	Reed, Monica	Pending

4. In the pending Note record, update the following fields:
 - a. "Note Subtype" = Leave as Ready to Submit
 - b. "Description" = *Update to include the due date for all deficiencies which is 45 calendar days from date of this note, or the application is closed, and the Provider must reapply*
 - c. "Append Text to Note" = List any missing documentation that is needed.
 - d. "Status" = Leave as *Pending*
 - e. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
 - f. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 05/10/2023

Associated Form ID#

Note Type * Provider Expansion Request

Note Sub-Type * Ready To Submit

Description ←

Must include the due date for all deficiencies which is 45 calendar days from date of this note, or the application is closed, and the

On 5/10/2023 at 8:39 PM, Monica Reed wrote:
Add any notes as necessary

On 5/16/2023 at 10:03 PM, Monica Reed wrote:
List any missing documentation that is needed

Note

New Text

B I U 16px A

Append Text to Note

Status * Pending

Date Completed

Attachments

Add Attachment

Document Description

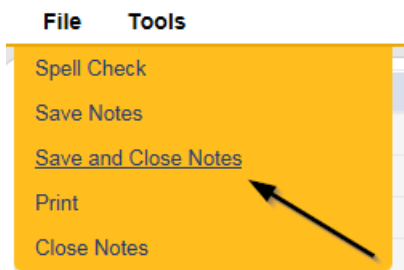
There are no attachments to display

Note Recipients

Add Note Recipient: [input] [Add] [Clear]

Name	Date Sent	Date Read
Reed, Monica	5/10/2023	

5. When finished click **File > Save and Close Notes**.



The Service Provider will receive the Provider Expansion Request/Ready to Submit Pending note on their My Dashboard and respond accordingly. Proceed to [Ready to Submit](#) and follow the process through until the Request is complete.

As Needed: Request Not Approved



The QA Workstream Worker will review the request and may not approve the expansion request.

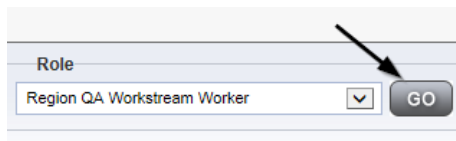
1. If the denial is due to without cause then the QA Workstream Worker will initiate the PAARF process.
2. If the denial is due to handbook denial, proceed to next section.

As Needed: Generate Handbook Denial

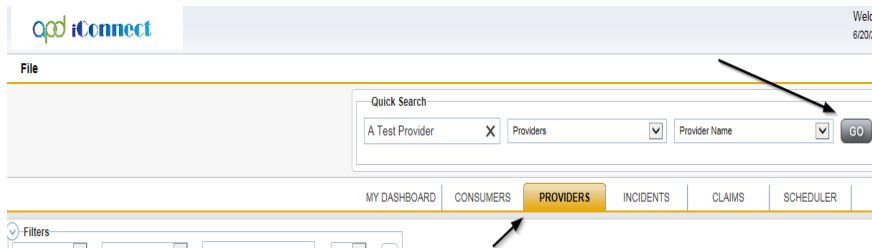


If the QA Workstream Worker did not approve the expansion request, they will generate a handbook denial word merge and attach to a note.

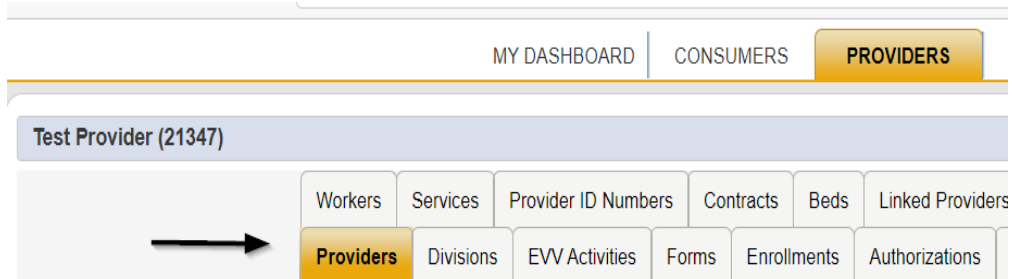
1. Set “Role” = Region QA Workstream Worker/Lead then click **Go**.



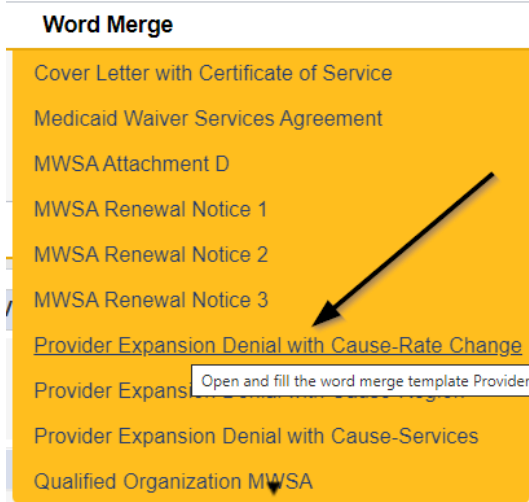
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click Go.



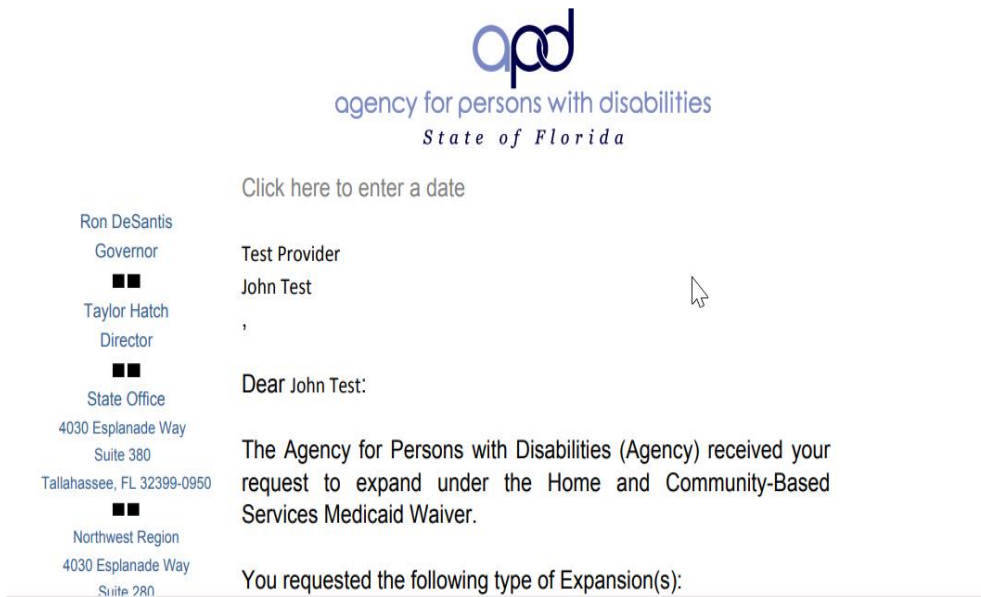
3. The Provider’s record will display. Navigate to the **Providers > Provider** tab.



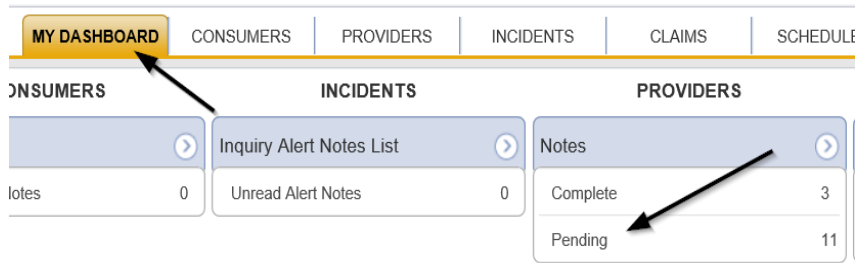
4. Select **Word Merge > Provider Expansion Denial with Cause-Rate Change**.



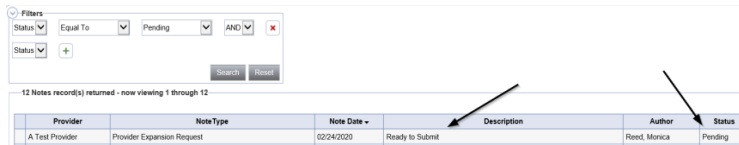
5. Generate the Word Merge, print, sign and then scan and save to the user's device.



6. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.



7. Select the **Note Type = Provider Expansion Request** and **Description = Ready to Submit** and select the pending record via the hyperlink.



8. In the pending Note record, update the following fields:
 - a. "Note Type" = Provider Expansion Request
 - b. "Note Subtype" = *Update to Expansion Denial*
 - c. "Associated Form ID" = Enter Form ID#
 - d. "Description" = *Update to "Solo to Agency Expansion Request Does Not Meet Handbook Requirements"*
 - e. "Append Text to Note" = Enter notes and add any relevant information
 - f. "Status" = *Update to Complete*
 - g. Click "Add Attachment" and search for the Signed Notice of Provider Expansion Denial with Reasons word merge on the user's device. Click Upload
 - h. Click the ellipsis on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
 - i. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 05/16/2023

Associated Form ID# 352

Note Type * Provider Expansion Request

Note Sub-Type * Expansion Denial

Description * Solo to Agency Expansion Request Does Not Meet Handbook Requirements

Note

Status * Complete

Date Completed 05/16/2023

Attachments

Add Attachment

Document Description

There are no attachments to display

Note Recipients

Add Note Recipient: Clear

Name	Date Sent	Date Read
Reed, Monica	05/16/2023	

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

