

# WSC iBudget Implementation Refresher Training



## Purpose

### WSCs:

- Understand the iBudget Rule
- Assist consumers in choosing waiver and non-waiver supports and services of their choice.
- Communicate accurate and timely information with consumers and their representatives

This training will provide refresher information to Waiver Support Coordinators (WSC) to assist with the implementation of the iBudget Algorithm pursuant to the iBudget Rules 65G-4.0213 through 65G-4.0218. WSCs must thoroughly understand the content of the iBudget Rules. WSCs need to understand the algorithm and explain it to the consumer and representative. The WSC must understand the role of the QSI in relation to the algorithm. The WSC must be able to facilitate discussions with consumer and their representative about the algorithm and understand how to work with iBudget Allocation by using both waiver and non-waiver supports. As a result of new APD iBudget Rules, the Agency is implementing a new algorithm for all consumers receiving iBudget Waiver services. WSCs play an integral role in assisting the consumers in choosing waiver and non-waiver supports and services. WSCs are the front lines of communication with consumers receiving services and their representatives and it is critical and required for accurate information to be conveyed.

## Additional Training Available

<http://apdcares.org/waiver/support-coordination>

WSCs may find additional training regarding the iBudget Rule and using the SAN system on the APD website. Please visit:  
<http://apdcares.org/waiver/support-coordination/>.

## Topics

- How iBudget Works
- How to Complete the AIM Process
- Notice of iBudget Amount

This training will provide refresher information on the iBudget Waiver and its flexibility. This training will cover the Amount Implementation Meeting (AIM) process, as well as WSC and APD responsibilities for the Notice of iBudget Amount.

## How iBudget Works

WSCs:

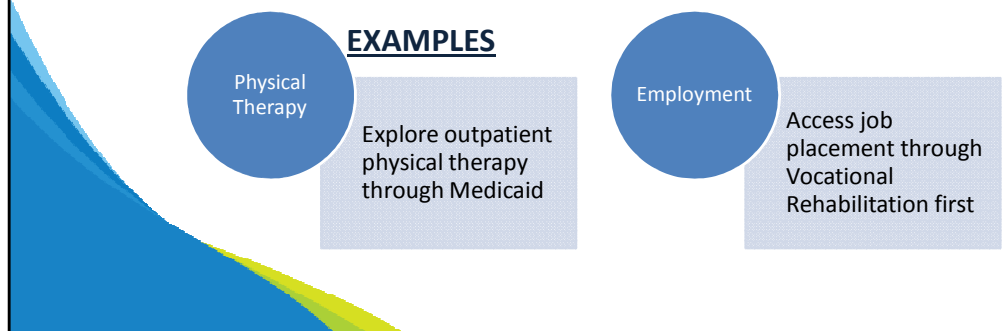
- Help consumers choose services and supports from an array of resources.
- Work with consumers to locate and develop natural and community supports.

The iBudget Waiver and iBudget system were designed to ensure that consumers have greater flexibility with their services. As a WSC, you are required to help the consumers that you serve choose services and supports from an array of resources. The iBudget Florida system places a special emphasis on WSCs' working with consumers and families to locate and develop natural and community supports.

# How iBudget Works

WSCs:

- Access resources such as private insurance, Medicaid State Plan, school services, or community organizations.



In some instances, these supports are from resources such as private insurance, Medicaid State Plan, or non-profit organizations. Using funding from the iBudget Waiver should be the last resort. All other resources should be used first. For example, after an adult exhausts the outpatient physical therapy available through Medicaid, they may access it through the iBudget Waiver if additional services remain medically necessary. Or, if an individual needs assistance in finding a job, they access job placement services through Vocational Rehabilitation and later follow-along services from the iBudget Waiver.

## How iBudget Works

- Develop natural supports, including the help of family, friends, colleagues, churches, or businesses who might be approached directly with requests to support consumers outside of a formal organizational program of assistance.

However, beyond this WSCs must work with consumers and their circles of support to identify and develop natural supports, including the help of family, friends, colleagues, churches, or businesses who might be approached directly with requests to support consumers outside of a formal organizational program of assistance. For example, the parent can drop off the individual at their Adult Day Training or job on their way to work rather than using waiver-funding transportation. Another example is a family friend can provide companionship while the individual goes to the gym to exercise instead of paid supports.

## How iBudget Works

Once services are authorized through the iBudget Waiver, consumers have flexibility to:

- Choose alternate supports and services within the iBudget Amount
- Choose and change providers
- Move unused dollars forward for service needs

Once services are authorized through the iBudget Waiver, consumers have flexibility to:

- Choose alternate supports and services within the iBudget Amount
- Choose and change providers
- Move unused dollars forward for new service needs. For example, an individual was sick and missed a week of ADT, but later wants extra Companion services to accompany them to volunteer opportunity that they are interested in doing.



## How iBudget Works

Before requesting increases in iBudget Amounts, the WSC must always ensure the following:

1. Identify if the need can be met through natural/community supports

Before requesting increases in iBudget Amounts, the WSC must always ensure the following:

1. Identify if the need can be met through natural/community supports. This should be documented in the support plan and/or case notes.

## How iBudget Works

Before requesting increases in iBudget Amounts, the WSC must always ensure the following:

2. Meet needs by moving funds from unused services

### EXAMPLE

Missed ADT



Re-budget the funds for a dental need

2. Meet needs by moving funds from unused services. The WSC can review service provide documentation and also discuss with the consumer if there were missed days/hours in services. For example, if an consumer was on vacation and did not attend ADT for a week, the unused ADT amounts could be moved to meet a dental need.

## How iBudget Works

- Before requesting increases in iBudget Amounts, the WSC must always ensure the following:

3. Meet needs by using existing budget that is not already be used for other services

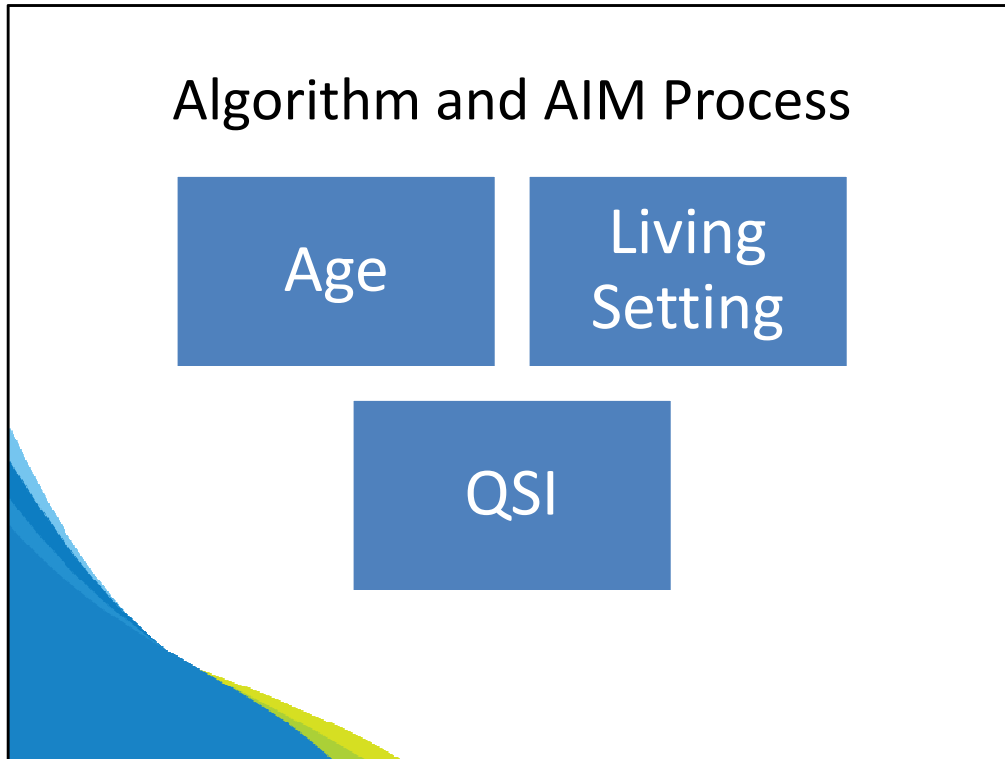
3. Meet needs by using existing budget that is not already being used for other services. Use the iBudget system to see if there are funds that have not been allocated to services. Those must be accessed first.

Even if funds are identified to be used for certain services, the WSC should discuss alternate options that will meet the health and safety needs of the consumer. For example can natural supports provide some supervision on a weekend so that money can be used to cover a dental need?

## How iBudget Works



Now we will introduce Robyn Stawski, self advocate to discuss iBudget flexibility for a more personal perspective.



During 2017, the APD will provide the new algorithm to WSCs. The new algorithm is based upon the consumer's age, living setting and the results of their needs assessment, the Questionnaire for Situational Information (QSI). When a new algorithm is calculated, the WSC must meet with the consumer and conduct the Amount Implementation Meeting, also known as the AIM. The WSC must document the AIM process using the AIM Worksheet. The AIM Worksheet is available online at <http://apd.myflorida.com/ibudget/users.htm>. The WSC may wish to schedule the AIM in conjunction with support planning.

## AIM Process

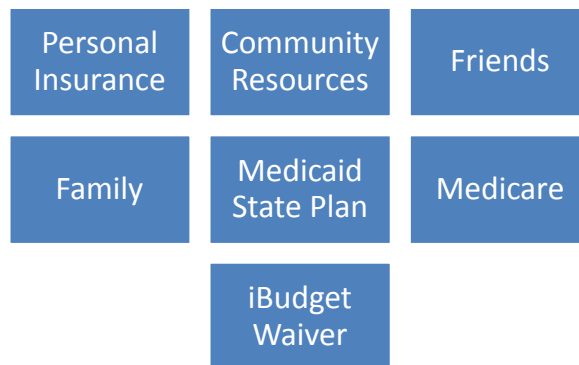
Discuss the iBudget allocation algorithm amount and describe how it was calculated using the EZ iBudget Calculator.

The allocation algorithm amount is the **starting point** for identifying needed waiver funding.

During the AIM Meeting, the WSC must discuss the iBudget allocation algorithm amount and describe how it was calculated using the EZ iBudget Calculator. The EZ iBudget Calculator is a graphical picture of the elements used to calculate the algorithm. The WSC can review this information with the consumer (or individual representative, if applicable) to ensure that accurate information was input in the calculation. The allocation algorithm amount is the starting point for identifying the waiver funding that is needed.

## AIM Process

Discuss how to meet needs and identify all available supports and resources available.



Discuss with the consumer and their representative how to meet the consumer's needs and identify all available supports and resources available. This includes, but is not limited to personal insurance, community resources, friends, family, Medicaid State Plan, Medicare, and iBudget Waiver services.

## AIM Process

- Discuss the iBudget allocation algorithm amount to determine if it can meet the consumer's needs
- Prioritize what services are most critical that cannot be met by other resources.

Discuss the iBudget allocation algorithm amount to determine if it can meet your needs and prioritize what services are most critical that cannot be met by other resources.



## AIM Process

- If service needs are greater than the iBudget allocation algorithm amount, assist the consumer in requesting those services or obtaining them from the appropriate resource.

If there are service needs that are greater than the iBudget allocation algorithm amount, assist the consumer in requesting those services or obtaining them from the appropriate resource. For example, if an individual resides in a licensed residential facility, and the algorithm does not cover the cost of residential habilitation, Waiver Support Coordinator, and Consumable Medical Supplies, the WSC should request additional funding for those critical services that are above the algorithm amount. These must be services that meet the criteria for Significant Additional Needs as defined in the iBudget Rule and are within the iBudget Waiver Coverage and Limitations Handbook.

## AIM Process

- Identify proposed services based upon the Allocation Algorithm Amount
- Identify additional services, if any, should the consumer have Significant Additional Needs that cannot be met within the Allocation Algorithm Amount or from other resources.

Complete the AIM Worksheet to document these discussions communicate the consumer's Allocation Algorithm Amount with the consumer and consumer representative, if they have one. They should identify proposed services based upon the Allocation Algorithm Amount, and identify additional services, if any, should the consumer or their representative feel that any Significant Additional Needs of the consumer cannot be met within the Allocation Algorithm Amount. Please make sure the algorithm amount reflected on this page is current and accurate based on WSC review of the EZ Budget Calculator provided by APD.

# AIM Worksheet



Amount Implementation Meeting (AIM) Worksheet - APD 2015-01

## Discussion on iBudget Amount

Date: _____	Date of Enrollment: _____
Individual: _____	Field Office: _____
Legal Rep: _____	Region: _____
Attendees: _____	PIN: _____
WSC: _____	Date of Birth: _____
Algorithm Amt: _____	Proposed iBudget CP: _____

Please identify Significant Additional Needs that justify funding to exceed the algorithm amount.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I have met with my Waiver Support Coordinator to discuss my Budget.

Individual or Legal Representative (Signature) \_\_\_\_\_ Date: \_\_\_\_\_  
Individual or Legal Representative Printed Name \_\_\_\_\_

## For Regional Office Use Only

Waiver Unit Staff Member Notes: \*Attach a page if space here is not sufficient.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Total of services required to meet Significant Additional Needs: \_\_\_\_\_  
Total of all services: \_\_\_\_\_  
Final Recommended Amount: \_\_\_\_\_  APPROVED  
Signature of ROM: \_\_\_\_\_  NOT APPROVED Date: \_\_\_\_\_

Effective 12/9/2014, Updated 5/21/2015.

Rule 65G-4.0213

Page 1 of 3

On page 1 of the AIM Worksheet, the WSC will populate the demographic information at the top and identify any Significant Additional Needs if additional funding is requested about the algorithm amount. The WSC must have the consumer and/or consumer representative check the box in the middle of the form and sign acknowledging the discussion that occurred.



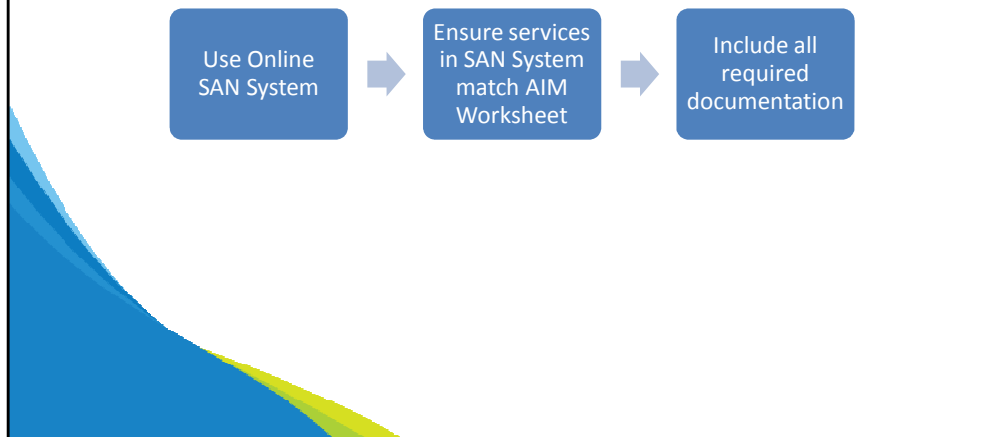
## AIM Worksheet

- Page 3 of the AIM is utilized by APD as part of the individual review. Page 3 does not need to be completed by the WSC.

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# AIM Worksheet

## Waiver Service Needs Exceed Algorithm Amount



If a consumer has significant additional needs that exceed the algorithm amount, the WSC is required to request the services using the Agency's online SAN system. Please ensure that the services identified in the SAN system match the AIM Worksheet and include all documentation necessary to support requested services.

# Requesting Services Over the Algorithm/SANs

## DOCUMENTATION REQUIREMENTS

Service	All documentation requirements listed below are identified in Rule 65G-4.0218 Significant Additional Need Funding and/or the DD iBudget Handbook Rule 59G-13.070.
Adult Dental Services	<ul style="list-style-type: none"> <li>An invoice listing each procedure and negotiated cost.</li> <li>Copy of treatment plan</li> </ul>
Behavior Analysis Services	<ul style="list-style-type: none"> <li>Service logs</li> <li>Graphic display of acquisition and reduction target behaviors (submitted quarterly)</li> <li>Behavior analysis service plan (BASP)</li> <li>Quarterly summary for each quarter in which services were provided. The third quarterly summary also serves as the annual report and must include a summary for the previous quarters.</li> <li>Copy of assessment report if an assessment was authorized and billed</li> </ul>
Behavior Assistant Services	<ul style="list-style-type: none"> <li>Copy of current BASP that includes a fading plan</li> <li>Service logs</li> <li>Quarterly summary for each quarter in which services were provided. The third quarterly summary also serves as the annual report and must include a summary for the previous quarters.</li> <li>Behavior Assessment</li> </ul>
Consumable Medical Supplies/Personal Care Items	<ul style="list-style-type: none"> <li>Listing of supplies purchased</li> <li>Prescription when applicable</li> </ul> <p>PLEASE NOTE: - All supplies must be related to the recipient's developmental disability; not covered by the Medicaid state plan and meet the</p>

The documentation requirements are identified in the iBudget Rule and also posted on the APD website at <http://apdcares.org/waiver/support-coordination/>. It is the responsibility of the WSC to gather the required documentation and attach it to the SAN request online. *Common documentation required are support plans, prescriptions, service logs, annual reports, etc.*

## AIM Worksheet

- If the algorithm is accepted by the consumer/individual representative, WSC sends the AIM Worksheet via encrypted email to the Regional designed address:

[northwest.aim@apdcares.org](mailto:northwest.aim@apdcares.org)

[northeast.aim@apdcares.org](mailto:northeast.aim@apdcares.org)

[central.aim@apdcares.org](mailto:central.aim@apdcares.org)

[suncoast.aim@apdcares.org](mailto:suncoast.aim@apdcares.org)

[southeast.aim@apdcares.org](mailto:southeast.aim@apdcares.org)

[southern.aim@apdcares.org](mailto:southern.aim@apdcares.org)

If the algorithm is accepted by the consumer/individual representative, then the AIM Worksheet is submitted to the APD Regional office by encrypted email to the designed email address.



## Individual Review

- APD will complete an individual review of the AIM Worksheet, Support Plan, and other documentation.
- If services above the algorithm are requested, APD will determine if service needs meet rule criteria for Significant Additional Needs funding.

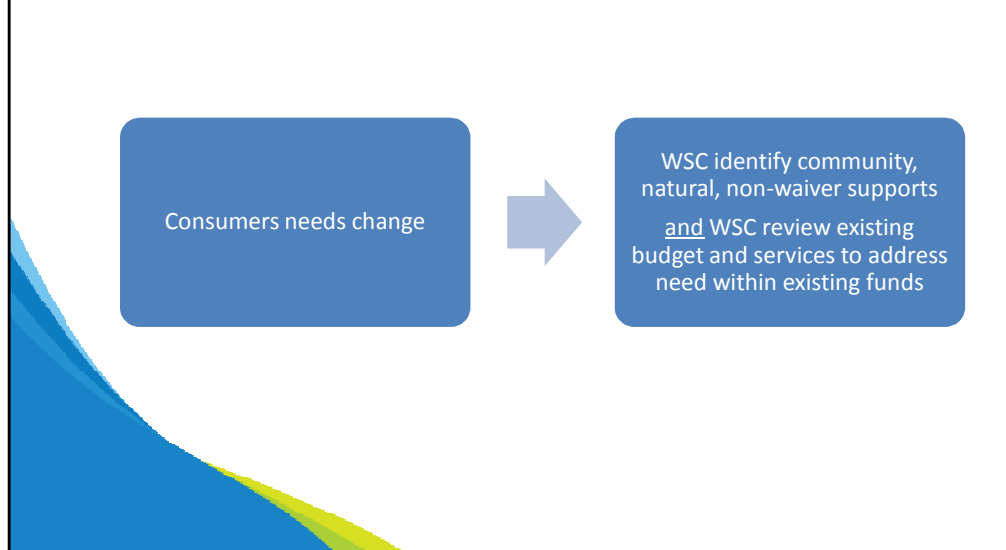
APD will complete an individual review of the AIM Worksheet, Support Plan, and other documentation. If services above the algorithm are requested, APD will determine if service needs meet rule criteria for Significant Additional Needs funding.

## Notice of iBudget Amount

- The Agency will issue a Notice of iBudget Amount to the consumer, representative and WSC that explains the final iBudget Amount.
- The WSC should discuss the notice with the consumer to ensure their receipt and understanding.

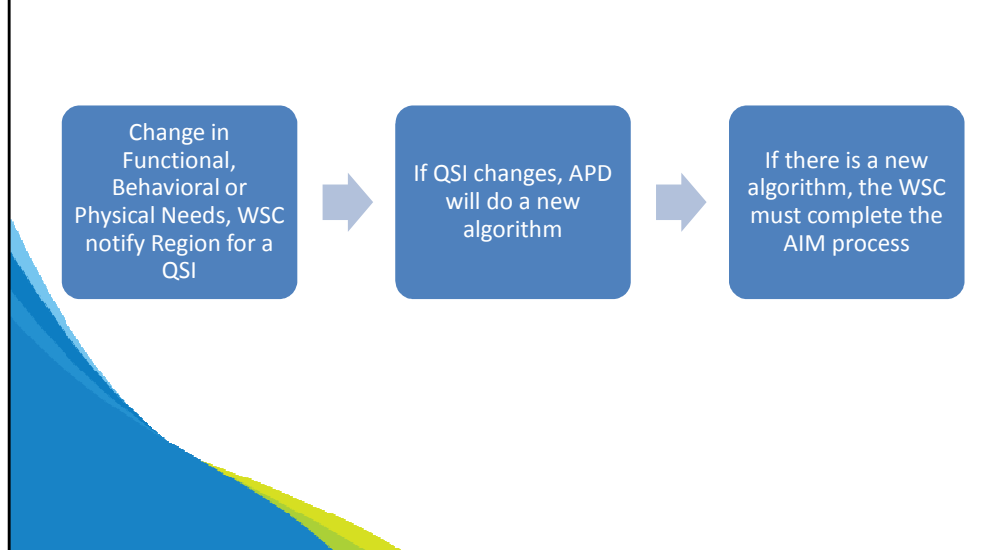
After conducting an individual review of the AIM Worksheet and supporting documentation, the Agency will identify the consumer's final iBudget Amount. The Agency will issue a Notice of iBudget Amount to the consumer, representative and WSC. The WSC should discuss the notice with the consumer to ensure their receipt and understanding.

## SAN Requests/Changed Needs



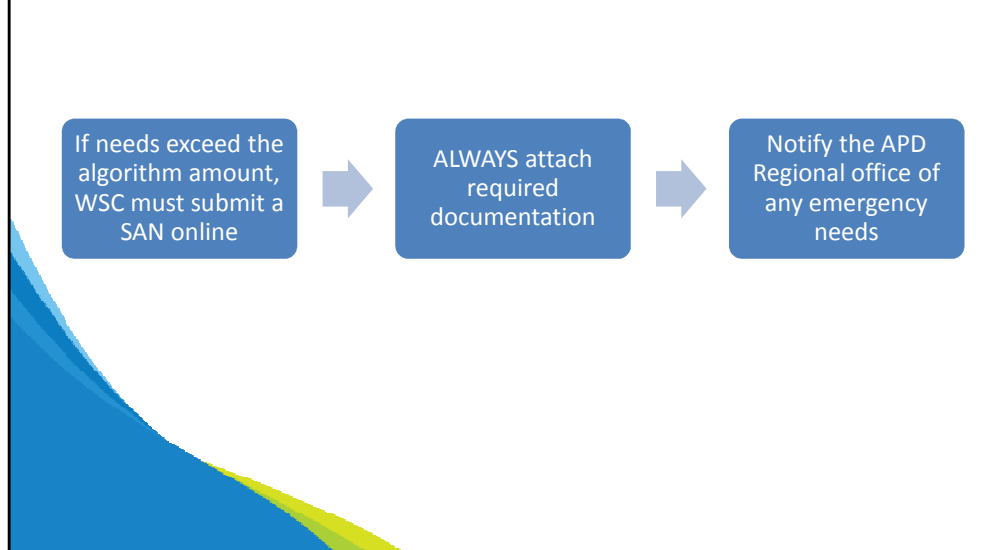
Sometimes a consumer may experience a change and request increased services at times other than the annual support plan. The WSC is responsible for promptly addressing any changed needs. As a first step, the WSC should identify any community or non-waiver supports to assist. The WSC should review the existing budget and services to determine if funds can be moved around within the allocation to address the changed need.

## SAN Requests/Changed Needs



If the consumer's change is related to the functional, behavioral, or physical needs of the consumer, the WSC should notify the Region that a new QSI may be needed. For example, if a consumer has a new health concern and they require greater assistance with activities of daily living skills, a new QSI may be needed. However, if a change is related solely to the caregiver, a new QSI would not be needed. When a new QSI is completed, if it changes, the WSC will receive an updated algorithm amount from the Regional office. Anytime the algorithm changes, the WSC is required to complete the AIM process.

## SAN Requests/Changed Needs



If the individual requires services greater than the algorithm amount, the WSC will request funds through the online SAN system. It is critical for the WSC to attach required documentation to ensure services are reviewed based on current and correct information. During the SAN process, the WSC can use existing budget to meet the individual's needs. If emergency funds are required, the WSC should notify the Regional office immediately.

## Information/Questions

- Thank you for watching!
- For questions, please contact [iBudgetQuestions@apdcares.org](mailto:iBudgetQuestions@apdcares.org).

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