Waiver Management System (WAMS) Provider User Guide

June 2018

Version 2.0

Virginia Department of Behavioral Health & Developmental Services (DBHDS)

Created and customized for you by Dee Dee Thomas, WaMS Training Services on June 22, 2018.

Table of Contents

1 Navigating the WaMS Environment 1

1.1 About WaMS 1

1.2 Become familiar with the WaMS environment 1

1.3 Log In to WaMS 1

1.4 Navigating WaMS 2

1.4.1 Home Tab 2

1.4.2 Dashboard Tab 2

1.4.3 My Lists Tab 2

1.4.4 Alerts Tab 2

1.4.5 Reports Tab 2

1.4.6 Service Authorizations Tab 3

1.4.7 Person's Details Tab 3

2 Roles and Permissions 4

3 Locating and Working with Individual's Record 6

3.1 Alerts Tab 6

3.1.1 View Alerts 6

3.1.2 Grouping Alerts 7

3.1.3 Go to Individual's Record 9

3.2 My Lists Tab 9

3.2.1 Individual Support Plan 9

3.2.2 Recertification (ISP) 10

3.2.3 Service Authorizations 11

3.3 Search Filter 12

4 Individual Support Plan 13
4.1 ISP Symbols in WaMS 14
4.2 Part IV. Agreements 14
4.3 Part V. Plan for Supports – Complete Use 18
4.3.1 Add Part V to ISP 18
4.3.2 General Schedule of Supports 23
4.3.3 Signatures 25
4.3.4 Safety Restrictions 28
4.3.5 Complete Part V 29
4.3.6 Revise Part V 30
4.3.7 Status Line for Part V - Plan of Supports 33
4.4 Part V. Plan for Supports – Modified Use 33
4.4.1 Add Part V to ISP 34
4.4.2 General Schedule of Supports 38
4.4.3 Signatures 39
4.5 Complete Part V – Modified Use 42
4.6 Upload Attachments to ISP 42
4.7 Add Form Note to ISP 44
4.8 Complete ISP 44
4.9 Print ISP 46
4.9.1 Print Entire ISP 46
4.9.2 Print Part V – Plan for Supports 46
5 Service Authorizations 47
5.1 Add Service Lines 48
5.2 SA Notes 50
5.2.1 View and Add Notes to SA 50
5.3 Submit SA to Support Coordinator 52
5.4 Edit SA 53
5.5 Revise SA 54
5.5.1 Locate the SA to be Revised 55
5.5.2 Revise the SA 56
5.6 End Service Line 58

6 WaMS Menu Options 59
6.1 Main 59
6.2 Administration / User Directory 59
6.3 My Information 59
6.3.1 My Profile, Overview 59
6.3.2 My Profile, My Delegations 60
6.3.3 My Organization Unit 62
6.3.4 My Staff 62
6.4 Tools 62
6.4.1 Service Definitions 62
6.5 Feedback 64
6.5.1 Submit Feedback to WaMS Helpdesk 64
6.5.2 View List of Previously Submitted Feedback 65
6.6 Print (Print the Screen) 66
7 Add New Staff Members 67
7.1 Complete Staff Profile – General Information 67
7.1.1 Add User Information 68
7.2 Add Role for New Staff Member 69
8 Miscellaneous 71
8.1 Set Email Notification for Alerts 71
8.2 Dashboard 72
8.2.1 Dashboard Calendar 72
8.2.2 Dashboard Alerts 74
8.2.3 Dashboard To Do List 75
8.3 Forgot User Name or Password 77
8.3.1 Receive Forgotten User Name 77
8.3.2 Reset Password 78
9 Index 80

1 Navigating the WaMS Environment

1.1 About WaMS

The **Waiver Management System** (WaMS) is a web hosted data management system used to manage waivers. WaMS interfaces with the **Virginia Medicaid Management Information System** (VAMMIS), and establishes the assessment levels (of care) based on an individual's needs and automates the authorization process. Additionally, WaMS interfaces with various **Electronic Health Record** (EHR) systems to transfer data into WaMS.

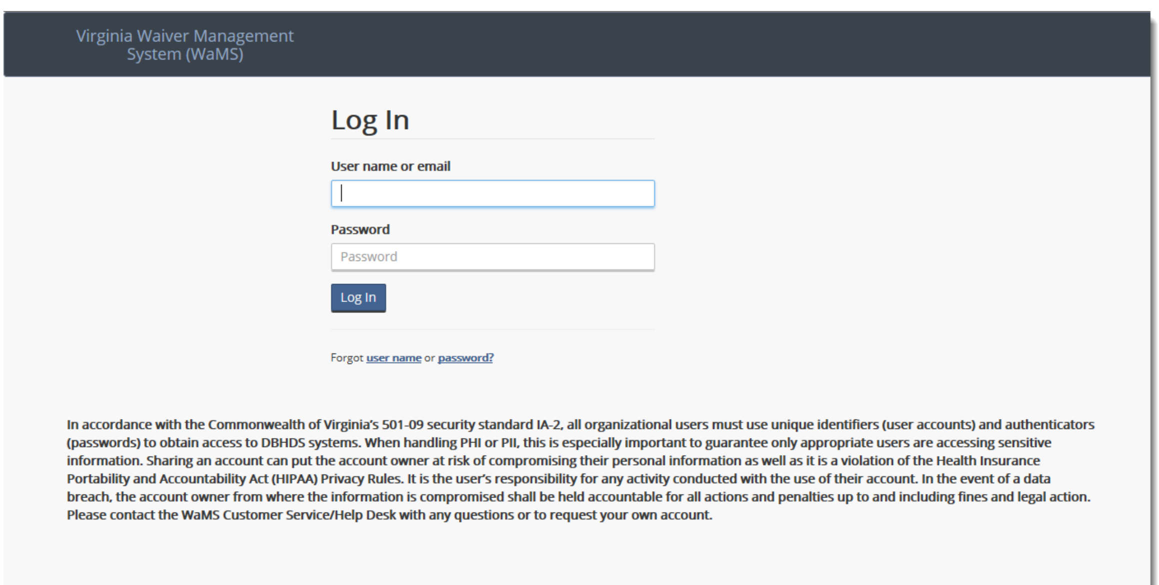
WaMS is customized to allow a single process for service authorizations for all three waivers (Community Living, Family and Individual Supports, and Building Independence) supporting individuals with intellectual or developmental disabilities (ID/DD).

1.2 Become familiar with the WaMS environment

The options and view that is available in WaMS is based on the assigned role. Take time to use the various tabs and tools in WaMS to determine how to best support your workstyle by using the *Dashboard*, *Alerts*, *My Lists* and *Service Authorization* tabs. See more information on using these tabs below.

1.3 Log In to WaMS

1. From an internet browser type: ***https://www.wamsvirginia.org*** in the address bar.
2. Type in your **User name** or **Email**.
3. Type in your **password**.
4. Click on **Log In**. *WaMS opens to the Home page. What you see in WaMS is based on the role that has been assigned.*



1.4 Navigating WaMS

The tabs at the top of the WaMS window are useful for high-level navigation through the system. The following tabs are included in the top-level navigation:

1.4.1 Home Tab

The **Home** tab is the landing page upon logging in to WaMS and consists of the following sections:

- Announcements: This section provides important announcements as needed
- Recent Alerts: This section describes systems alerts for WaMS
- Recent System Updates: This section displays announcements regarding WaMS system enhancement based on user requirements.
- Upcoming Events: This section displays information regarding any upcoming events such as training.
- Technical Support: This section contains contact information, such as the helpline number and email for WaMS technical support.
- Training Manuals, Webinars, and FAQs: This section provides detailed instructional materials, user guides, presentations and video recordings on how to use WaMS.

1.4.2 Dashboard Tab

The **Dashboard** provides a snapshot of what should be worked on in WaMS. It is divided in to three sections to provide a quick glance of *Calendar* events (manually added and system generated), your 10 most recent *Alerts* and *To-Do List* in WaMS.

1.4.3 My Lists Tab

The **My Lists** tab allows for locating a subset of persons based on a specific criteria or category as defined in the drop down list. For example, view a list of all persons based on the status of *Individual Support Plan (ISP), ISP Recertification* and *Service Authorization*. Lists are available based on the role of the user logged in.

1.4.4 Alerts Tab

Alerts are notifications sent of actions and updates that have been made to a individual's file.

1.4.5 Reports Tab

The **Reports** tab provides access to the *Slot Management* reports available in WaMS for the *Provider Admin* role.

> Note: The ISP Approver role does not have access to the Reports information.

1.4.6 Service Authorizations Tab

The **Service Authorizations** tab provides a more direct access to Service Authorizations. Search by the individual's name, assigned CSB, status, type of service or by any other available options.

1.4.7 Person's Details Tab

The **Person's Details** tab appears when an individual's profile is viewed from the *Dashboard*, *My Lists*, *Alerts* or *Service Authorizations* tabs. This is the entrance to all activities and functions associated with the individual.

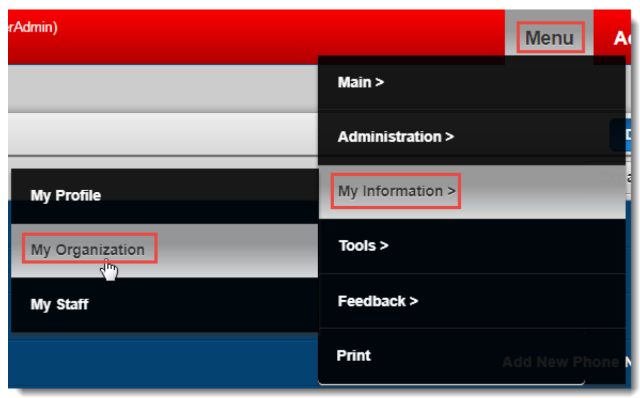
2 Roles and Permissions

WaMs functionality is based on Roles and Permissions. What you see in WaMS is based on how you are logged in. There are four types of Provider Roles in WaMS:

- **Provider Admin**
  - Add Service Lines to the Service Authorization
- **Provider ISP Approver**
  - Uploads attachments to ISP such as Part V – Plan for Supports, Activity Schedules, Nurse Plans, etc.
- **CM Provider**
  - Providers that have both provider and case manager responsibilities (i.e., has create/edit rights to Individual Support Plans and Service Authorizations)
- **Provider Billing**
  - Mostly read-only access to WaMS

To see the list of provider roles and permissions available in WaMS for your organization:

1. Click on **Menu**, **My Information**, **My Organization**.
2. Click on **Role.**



The Role List — Overview window for the organization opens.

3. Click on **View** for a specific role. *The Role details appear displaying permissions available for that role.*

3 Locating and Working with Individual's Record

There are several ways to find an individual to work with in WaMS.

Make use of the tabs and other tools to determine how to best support your personal workstyle. As an example, many access the *Alerts* tab at the beginning of the day. Alerts give insight to recent actions and updates that have been made to an individual's record. While others prefer to start with the *My Lists* tab, focusing on the *Individual Support Plans* (ISPs) and *Service Authorizations* information and needed actions.

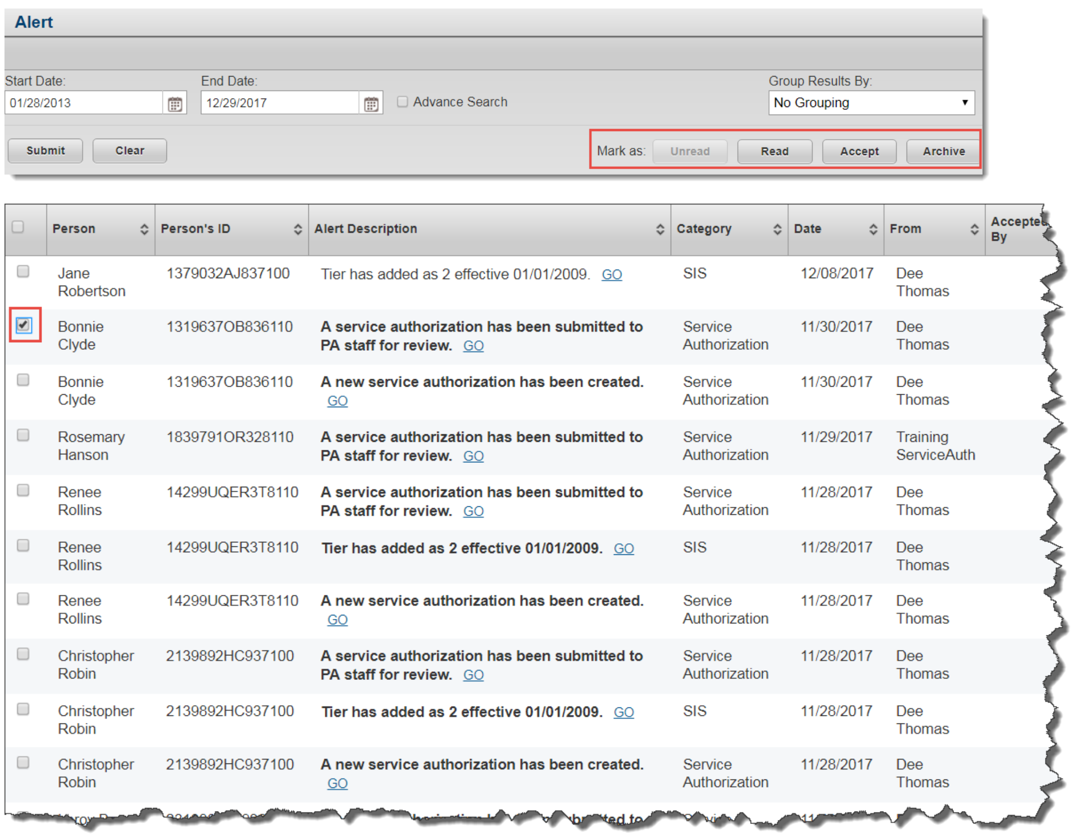
For CSBs who utilize EHRs for their centralized records, the data for Parts I, II, III and IV of the ISP will be transferred from the EHR into WaMS, thereby eliminating the need for double entry.

3.1 Alerts Tab

Alerts inform the recipient that some type of action is required or has been completed. Alerts are specific to the user's role and assignments to specific tasks. Use Alerts to view and accept notifications from others. The list displays at most 500 records.

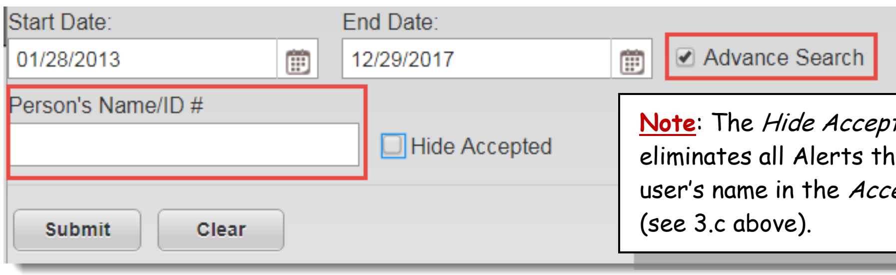
3.1.1 View Alerts

1. Click on the **Alerts** tab to display all current alerts.
2. Select the **Start** and **End** dates to narrow or broaden the search results.



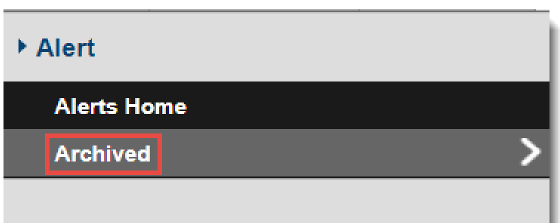
	Person	Person's ID	Alert Description	Category	Date	From	Accepted By
	Jane Robertson	1379032AJ837100	Tier has added as 2 effective 01/01/2009. GO	SIS	12/08/2017	Dee Thomas	
☑	Bonnie Clyde	1319637OB836110	**A service authorization has been submitted to PA staff for review.** GO	Service Authorization	11/30/2017	Dee Thomas	
	Bonnie Clyde	1319637OB836110	**A new service authorization has been created.** GO	Service Authorization	11/30/2017	Dee Thomas	
	Rosemary Hanson	1839791OR328110	**A service authorization has been submitted to PA staff for review.** GO	Service Authorization	11/29/2017	Training ServiceAuth	
	Renee Rollins	14299UQER3T8110	**A service authorization has been submitted to PA staff for review.** GO	Service Authorization	11/28/2017	Dee Thomas	
	Renee Rollins	14299UQER3T8110	**Tier has added as 2 effective 01/01/2009.** GO	SIS	11/28/2017	Dee Thomas	
	Renee Rollins	14299UQER3T8110	**A new service authorization has been created.** GO	Service Authorization	11/28/2017	Dee Thomas	
	Christopher Robin	2139892HC937100	**A service authorization has been submitted to PA staff for review.** GO	Service Authorization	11/28/2017	Dee Thomas	
	Christopher Robin	2139892HC937100	**Tier has added as 2 effective 01/01/2009.** GO	SIS	11/28/2017	Dee Thomas	
	Christopher Robin	2139892HC937100	**A new service authorization has been created.** GO	Service Authorization	11/28/2017	Dee Thomas	

3. Click the **check box** to the left of an individual's name to enable the *Mark as:* actions, then click on one of the actions:
    a. Unread – mark read items as *unread* to identify them as follow-up items. *Note*: *Unread and Read buttons will not be enabled at the same time*
    b. Read – mark unread items as read to identify completed actions. *Note*: *Unread and Read buttons will not be enabled at the same time*
    c. Accept – Login name shows in the *Accepted By* column. This is a useful tool to easily identify what actions have been completed on the alert.
    d. Archive – Move the selected alert to *Archived* (left menu item) section.
4. Click on **Advance Search** check box to locate the individual by the *Person's name or ID #*, then click on **Submit**.



Note: The *Hide Accepted* checkbox eliminates all Alerts that have the user's name in the *Accepted By* column (see 3.c above).

5. Click on **Archived** on the left nav bar to display all alerts that were marked as *Archive*.

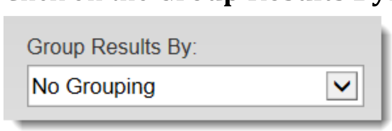


Note: It is a good idea to use the *Archive* option to move alerts that have been completed to the *Archived* section. You can always locate it there to view if necessary.

3.1.2 Grouping Alerts

To easily sort and locate alerts, group them by a *Person's Name*, *Date* or *Category*.

1. Click on the **Group Results By:** down arrow.



a. Select **Person's Name** to group all alerts received for an individual together.

Billie Jean					
☐	1109793IB127120	**A new note has been added to the Service Authorization record** GO	Service Authorization	11/09/2017	Training ServiceAuth
☐	1109793IB127120	**A service authorization has been submitted to PA staff for review.** GO	Service Authorization	11/09/2017	Dee Thomas
☐	1109793IB127120	**A new service authorization has been created.** GO	Service Authorization	11/09/2017	Dee Thomas
Bonnie Clyde					
☐	1319637OB836110	**A service authorization has been submitted to PA staff for review.** GO	Service Authorization	11/30/2017	Dee Thomas
☐	1319637OB836110	**A new service authorization has been created.** GO	Service Authorization	11/30/2017	Dee Thomas

b. Select **Date** to group alerts by all individuals based on date the alert is received.

10/11/2017					
☐	Lucas Huddleston	2579123UH927100	**A service authorization has been submitted to PA staff for review.** GO	Service Authorization	Dee Thomas
☐	Lucas Huddleston	2579123UH927100	**A new note has been added to the Service Authorization record** GO	Service Authorization	Dee Thomas
☐	Lara Jones	1809422AL929110	**A service authorization has been submitted to PA staff for review.** GO	Service Authorization	Dee Thomas
☐	Lara Jones	1809422AL929110	**A new service authorization has been created.** GO	Service Authorization	Dee Thomas
11/09/2017					
☐	Leroy Brown	2319889EL936130	**A service authorization has been submitted to PA staff for review.** GO	Service Authorization	Dee Thomas
☐	Leroy Brown	2319889EL936130	**A new note has been added to the Service Authorization record** GO	Service Authorization	Dee Thomas
☐	Leroy Brown	2319889EL936130	**A new service authorization has been created.** GO	Service Authorization	Dee Thomas
☐	Billie Jean	1109793IB127120	**A new note has been added to the Service Authorization record** GO	Service Authorization	Training ServiceAuth
☐	Billie Jean	1109793IB127120	**A service authorization has been submitted to PA staff for review.** GO	Service Authorization	Dee Thomas

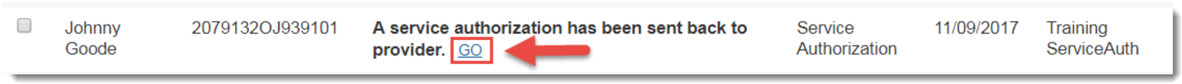
c. Select **Category** to group alerts by a category (i.e., *Service Authorization and SIS*).

Service Authorization					
☐	Bonnie Clyde	1319637OB836110	**A service authorization has been submitted to PA staff for review.** GO	11/30/2017	Dee Thomas
☐	Bonnie Clyde	1319637OB836110	**A new service authorization has been created.** GO	11/30/2017	Dee Thomas
☐	Rosemary Hanson	1839791OR328110	**A service authorization has been submitted to PA staff for review.** GO	11/29/2017	Training ServiceAuth
☐	Renee Rollins	14299UQER3T8110	**A service authorization has been submitted to PA staff for review.** GO	11/28/2017	Dee Thomas
☐	Renee Rollins	14299UQER3T8110	**A new service authorization has been created.** GO	11/28/2017	Dee Thomas
☐	Christopher Robin	2139892HC937100	**A service authorization has been submitted to PA staff for review.** GO	11/28/2017	Dee Thomas
☐	Christopher Robin	2139892HC937100	**A new service authorization has been created.** G		
☐	Leroy Brown	2319889EL936130	**A service authorization has been submitted to PA review.** GO		
☐	Leroy Brown	2319889EL936130	**A new note has been added to the Service Author record** GO		

Note: When logged in as an *ISP Approver* role, the alerts will be grouped by Individual Support Plans when *Category* is selected.

3.1.3 Go to Individual's Record

1. Click on **GO** to open the individual's record to be viewed or worked on.

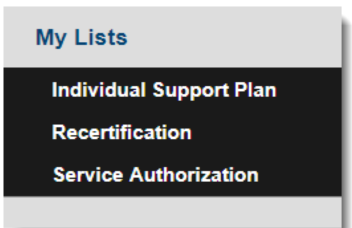


3.2 My Lists Tab

The *My Lists* tab allows for easy access to lists of individuals by of *Individual Support Plan, Recertification* and *Service Authorization*.

> **Note**: Providers are only able to view records for those individuals where the CSB has added them as a Provider.

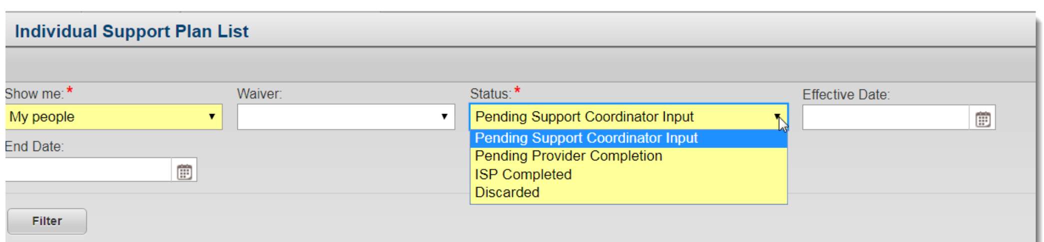
1. Click on the **My Lists** tab. *The **My Lists** options appear on the left*.



3.2.1 Individual Support Plan

Provides easy access to lists of individuals by ISP with a specific status.

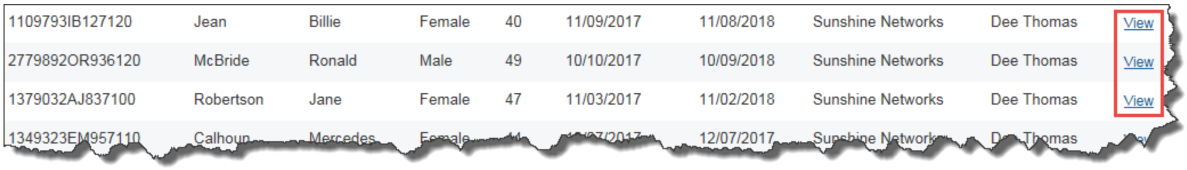
1. From the *My Lists* tab, click on **Individual Support Plan**.



2. Select required fields:
   a. **Show Me**
      i. My people (individuals where the CSB has added you as a Provider to the ISP)
   b. **Status**
      i. Pending Support Coordinator Input
      ii. Pending Provider Completion
      iii. ISP Completed
      iv. Discarded

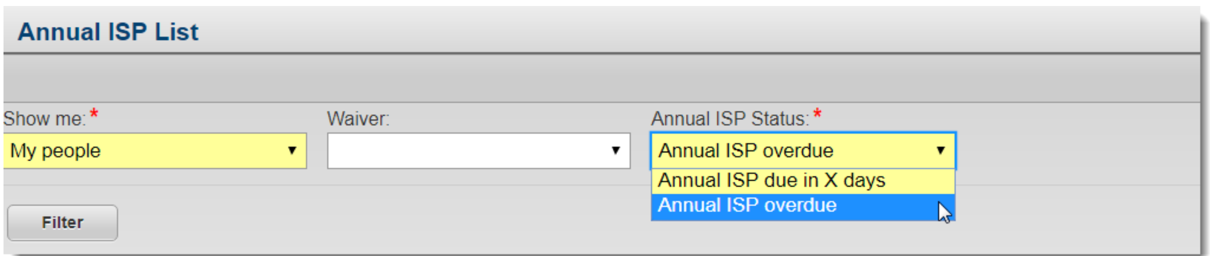
> **Note**: To narrow the search for the ISP, you can also select the Waiver type, Effective Date and/or End Date before clicking on filter.

3. Click on **Filter**. *The list of matching ISPs will appear.*
4. Click on **View** to go to an individual's record.

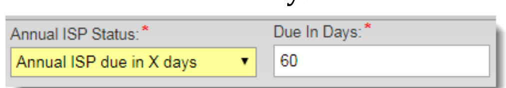


3.2.2 Recertification (ISP)

1. From the *My Lists* tab, click on **Recertification**.



2. Select required fields:
   a. **Show Me**
      i. My people (individuals where the CSB has added you as a Provider to the ISP)
   b. **Annual ISP Status**
      i. Annual ISP Overdue
      ii. Annual ISP due in X days



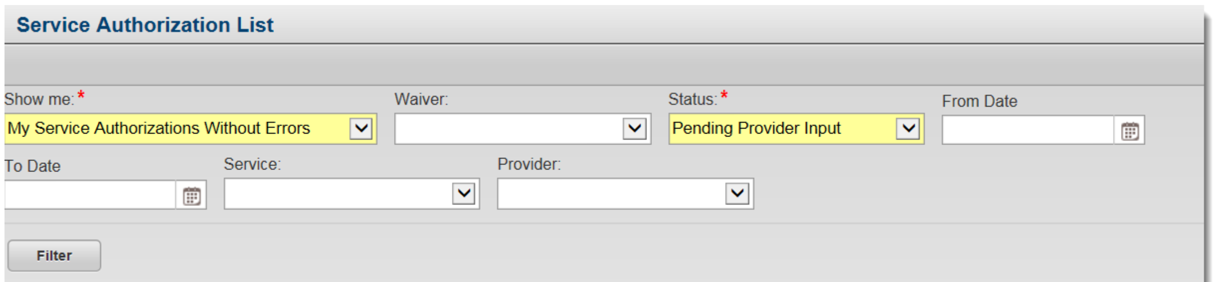
Note: *Due in X Days allows* you to add a specific number of days the annual ISP is due. (e.g., type in 60 to locate ISP recertification due 2 months).

3. Click on **Filter**. *The list of matching ISPs will appear.*

3.2.3 Service Authorizations

Provides easy access to a list of assigned individuals with Service Authorizations based on status.

1. From the *My Lists* tab, click on **Service Authorization**.

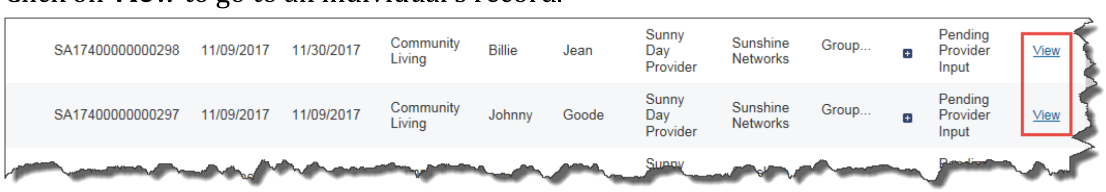


2. Complete required fields:
   a. **Show Me**
      i. My Service Authorizations without Errors
      ii. My Service Authorizations with Errors
   b. **Status**
      i. Pending Provider Input
      ii. Pending Support Coordinator Review
      iii. Pending PA Staff Review
      iv. Pending VAMMIS Approval
      v. VAMMIS Approval Complete
      vi. Waiver Slot Released
      vii. SA Terminated

Note: Providers are only able to view records for those individuals where the CSB has added them as a Provider.

Note: To narrow the search for the ISP, you can also select the Waiver type, Effective Date and/or End Date before clicking on filter.

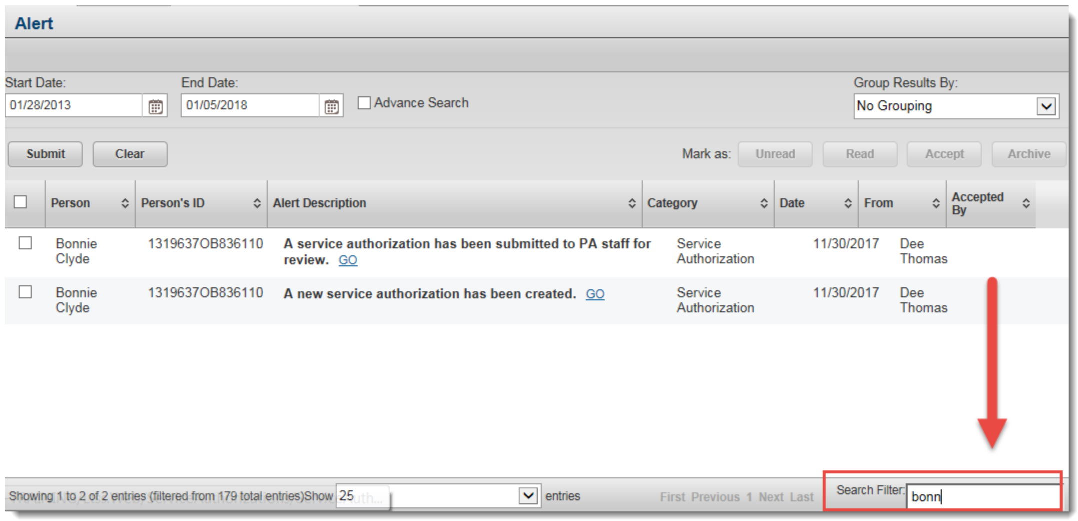
3. Click on **Filter**. *The list of matching Service Authorizations will appear.*
4. Click on **View** to go to an individual's record.



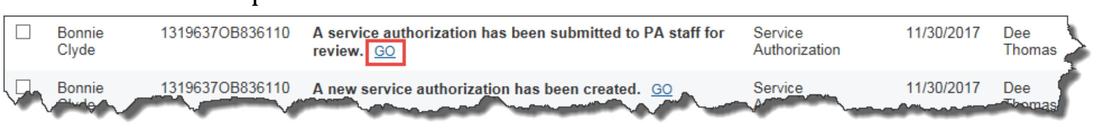
3.3 Search Filter

When looking for a specific individual in the *My List, Alerts* or other tabs, simply start typing their *first* or *last* name (or other column information known) in the *Search Filter* field (located in bottom right-hand corner) of each tab. The list will be filtered to display information that matches the criteria typed.

1. Click in the **Search Filter** field and begin typing the search criteria (e.g., first or last name). *The list filters to display only the information that matches the criteria typed.*



2. Click on **GO** to open the individual's record to be viewed or worked on.



4 Individual Support Plan

The Individual Support Plan (ISP) section in WaMS is used to enter information and attach documents necessary to determine services needed for an individual as well as the providers involved in providing services to the individual.

The *Support Coordinator* is responsible for *Parts I through IV* of the ISP in WaMS.

The Provider is responsible for adding signatures to the *Agreements* section in *Part IV*, and adding *Part V – Plan for Supports* in WaMS. The provider must have the *ISP Approver* role assigned in WaMS to perform these actions.

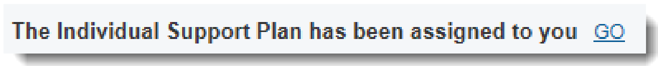
Providers have two choices to complete *Part V – Plan for Supports*: (1) **Complete Use**; or (2) **Modified Use**)[1].

Side-by-side Part V Use Comparison		
Part V Element	**Complete WaMS ISP Use**	**Modified WaMS ISP Use**
Outcome section pre-populated by WaMS	Yes	Yes
At least one support activity per outcome	Yes	Yes
A summary of support activities per outcome	No	Yes
Support activity measures entered	Yes	No
Data method identified	Yes	No
Skill-building indicated (radio button, yes/no)	Yes	Yes
Frequency of supports	Yes	No
Target date	Yes	Yes
General Schedule	Yes	No
Safety Restrictions	Yes	No

[1] An interim Part V process for all providers begins on July 1, 2018

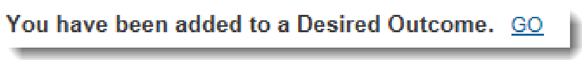
Providers receive alerts when they are added to an ISP. Once a provider is added by the CSB, that provider will be able to open the ISP, view any added information, upload attachments, add notes, and sign in the *Agreements* section in *Part IV*.

Alerts: 1

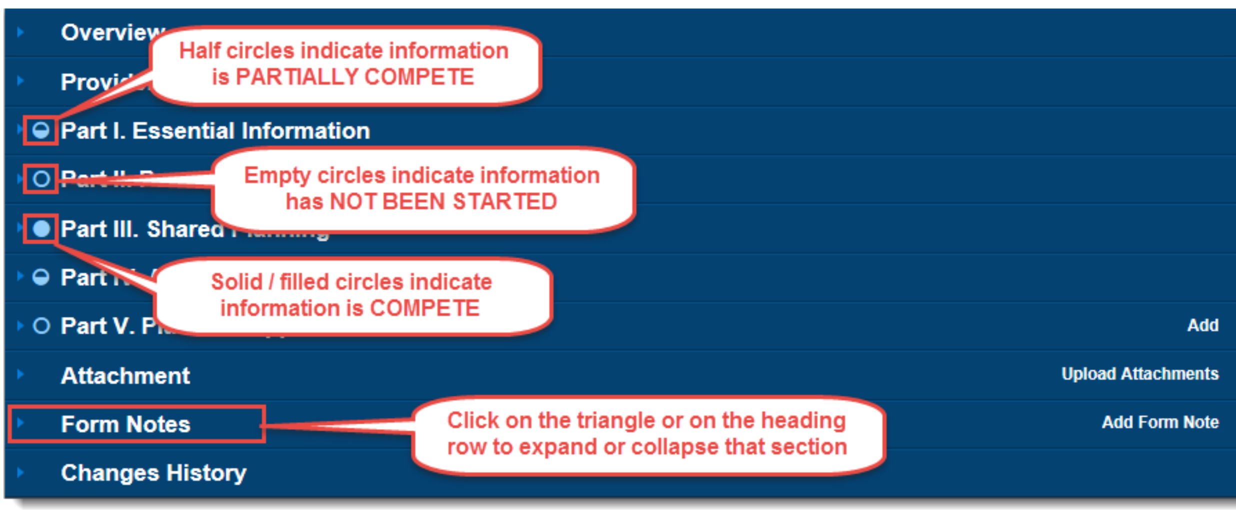


Providers will not be able to add *Part V – Plan for Supports* until a *Desired Outcome* has been assigned to them. Providers will receive an alert when they are added to an outcome.

Alerts: 2



4.1 ISP Symbols in WaMS



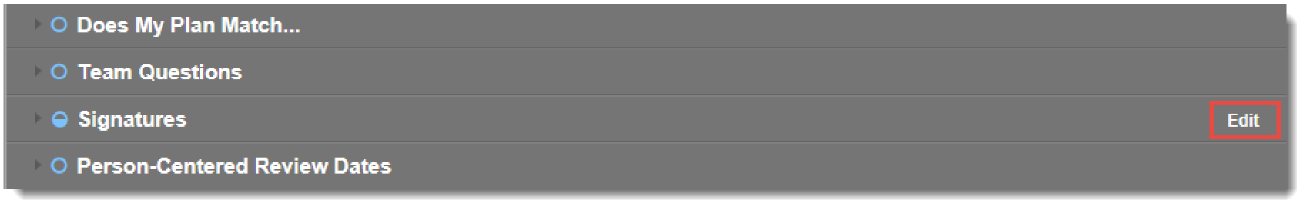
4.2 Part IV. Agreements

4.2.1.1 Part IV Signatures

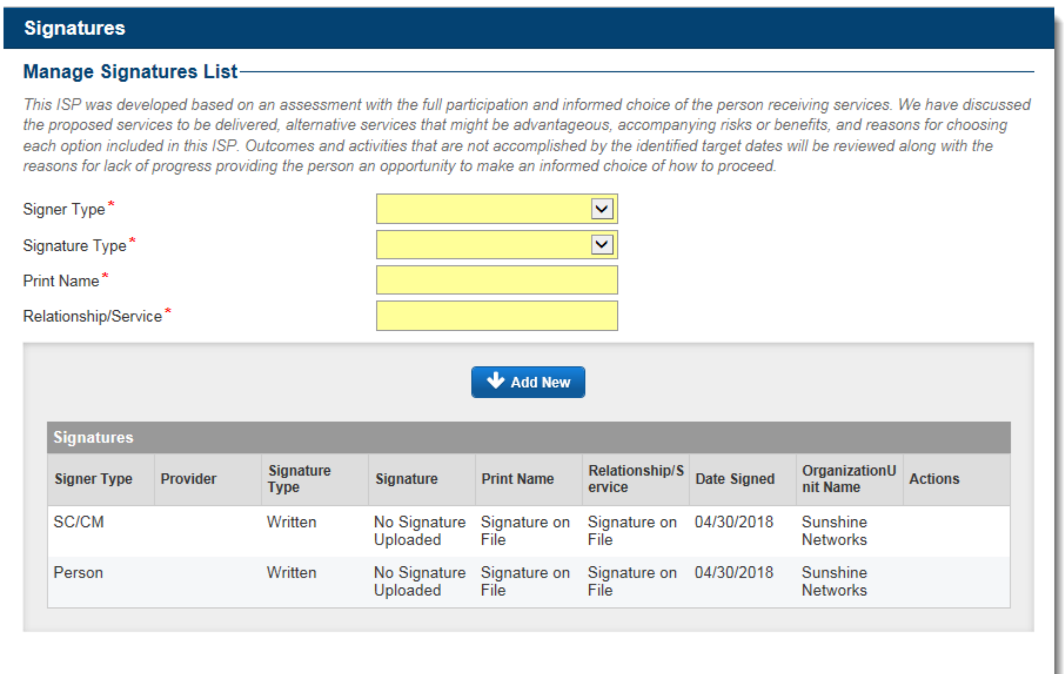
Signatures should be kept on file and denoted as such in WaMS. Signatures capture participation in Parts I-IV of the ISP and represent all parties agreeing to, and involved in, the execution of the ISP. This includes the Person, Substitute Decision Maker, Support Coordinator/Case Manager (SC/CM), Provider, Family, Friend, and Other.

> Note: All Providers must log in to WaMS and sign their respective ISP Part IV before the Part IV can be completed by the Support Coordinator.

1. Click on the **Part IV. Agreements** heading or the **Triangle** to expand the section. *The parts of the Agreements sections are displayed.*



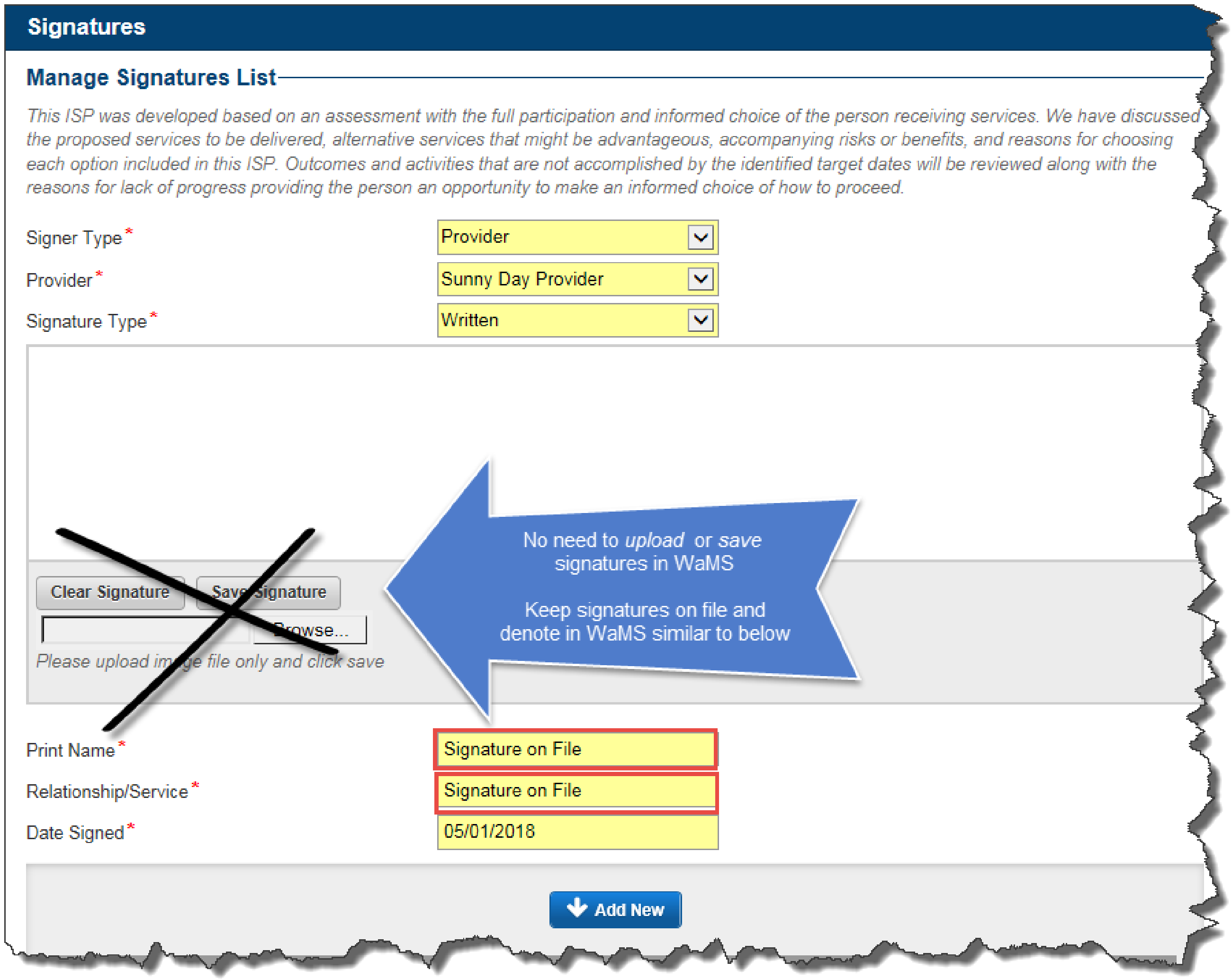
2. Click on **Edit** for *Signatures*. (If CSB, Person and other representatives have signed, they will be displayed in the Signatures section).



Signer Type	Provider	Signature Type	Signature	Print Name	Relationship/Service	Date Signed	OrganizationUnit Name	Actions
SC/CM		Written	No Signature Uploaded	Signature on File	Signature on File	04/30/2018	Sunshine Networks	
Person		Written	No Signature Uploaded	Signature on File	Signature on File	04/30/2018	Sunshine Networks	

To Add Details for Signature on File:

a. Click on the **Signer Type** drop down arrow to select the appropriate signer (*Person, Substitute Decision Maker, Provider, Family, Friend or Other*).
b. Click on the **Provider** drop down arrow to select the provider's name.
c. Click on the **Signature Type** drop down and select **Written**.



d. In the **Print Name** field type **Signature on File**.
e. In the *Relationship/Service* field type **Signature on File**.
f. Select the **Date Signed**.
g. Click on the **Add New** button.
h. Click on **Save**. *The signature is added to the ISP and the ISP Main page reappears.*

i. Note: The signature will be displayed as "**No Signature Uploaded**".

Signatures								
Signer Type	**Provider**	**Signature Type**	**Signature**	**Print Name**	**Relationship/Service**	**Date Signed**	**OrganizationUnit Name**	**Actions**
SC/CM		Written	No Signature Uploaded	Signature on File	Signature on File	04/30/2018	Sunshine Networks	
Person		Written	No Signature Uploaded	Signature on File	Signature on File	04/30/2018	Sunshine Networks	
Provider	Sunny Day Provider	Written	No Signature Uploaded	Signature on File	Signature on File	05/01/2018	Provider - Sunny Day	Edit Remove

A signature can also be denoted in WaMS if an individual contributor to the plan is not available to sign during the planning meeting but has agreed to the plan.

When Contributor not here for planning:

> **Note**: The Provider is listed in the "Signer Type" when logged in WaMS with the "Provider ISP Approver" role.

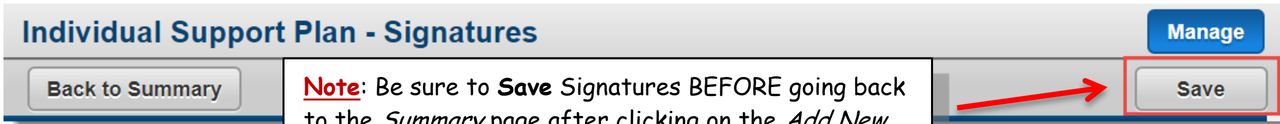
a. In the *Manage Signatures List*, click on the **Signer Type** drop down arrow to select the appropriate signer (*Person, Substitute Decision Maker, Provider, Family, Friend or Other*).
b. Click on the **Signature Type** drop down and select **Contributor not here for planning**.
c. Type in the name of the person signing in the **Print Name** field.
d. Type in the **Relationship/Service**.
e. Click on the **Add New** button.

Signer Type *	Family
Signature Type *	Contributor not here for planni
Print Name *	John Hypes
Relationship/Service *	Father

The information for the contributor is added to the Signatures area.

Signatures								
Signer Type	**Provider**	**Signature Type**	**Signature**	**Print Name**	**Relationship/Service**	**Date Signed**	**OrganizationUnit Name**	**Actions**
SC/CM		Written	No Signature Uploaded	Signature on File	Signature on File	04/30/2018	Sunshine Networks	
Person		Written	No Signature Uploaded	Signature on File	Signature on File	04/30/2018	Sunshine Networks	
Provider	Sunny Day Provider	Written	No Signature Uploaded	Signature on File	Signature on File	05/01/2018	Provider - Sunny Day	Edit Remove
Family		Contributor not here for planning	No Signature Uploaded	John Hypes	Father		Provider - Sunny Day	Edit Remove

f. Click on **Save**. *The contributor information is added to the ISP and the ISP Main page reappears.*



Note: Be sure to **Save** Signatures BEFORE going back to the *Summary* page after clicking on the *Add New* button when adding signatures.

Note: The Provider signature is required before the Support Coordinator can **Complete** the *Signatures* section in Part IV.

4.3 Part V. Plan for Supports – Complete Use

Part V – Plan for Supports is added by the provider based on information added to the *Part III – Shared Planning* by the Support Coordinator. As soon as the Support Coordinator has completed *Part III* and an outcome is added for a Provider, the *Part V* section will be available in WaMS for that provider to add it to the ISP.

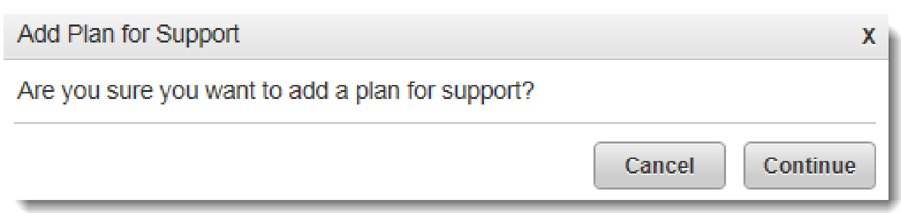
Part III – Shared Planning is a living document in WaMS that details changes across services throughout the ISP year. It maintains the elements of each outcome, is initially entered by the Support Coordinator and can be modified throughout the plan year via the provider *Part V – Plan for Supports*. In this manner, changes in the individual's waiver plans are submitted, reviewed, approved, and consolidated within WaMS for access by the planning team.

Providers capture signature in *Part IV* and enter ALL *Part V* elements in WaMS; and upload a copy of the support instructions.

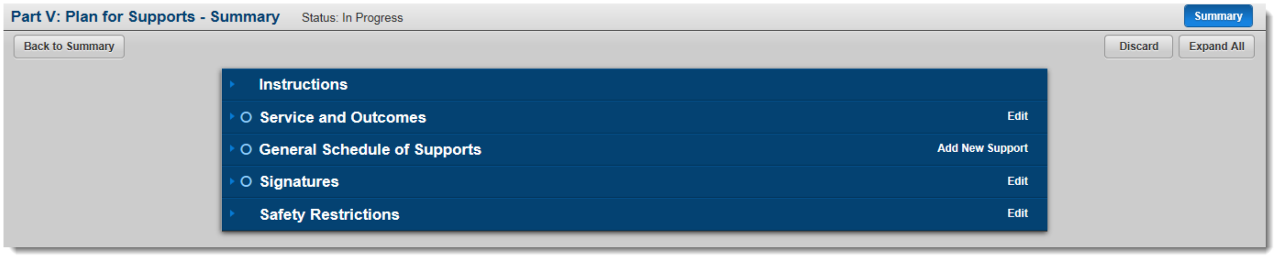
Note: It is a good idea to view *Part III – Shared Planning* to see the desired outcome(s) that have been assigned by the Support Coordinator.

4.3.1 Add Part V to ISP

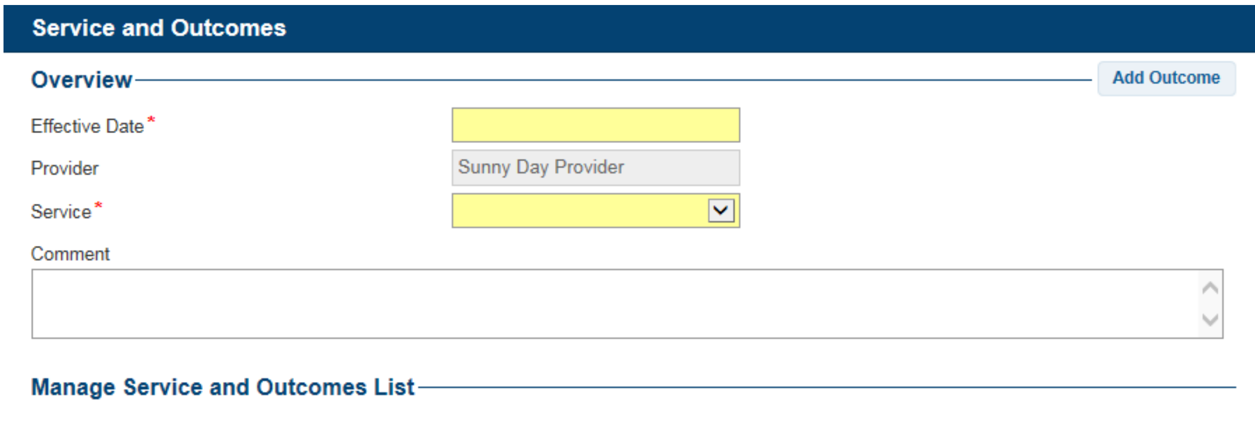
1. Click on the **Add** for *V. Plan for Supports*. *The Add Plan for Support dialog box appears.*



2. Click on **Continue**. *The Part V: Plan for Supports – Summary page appears.*

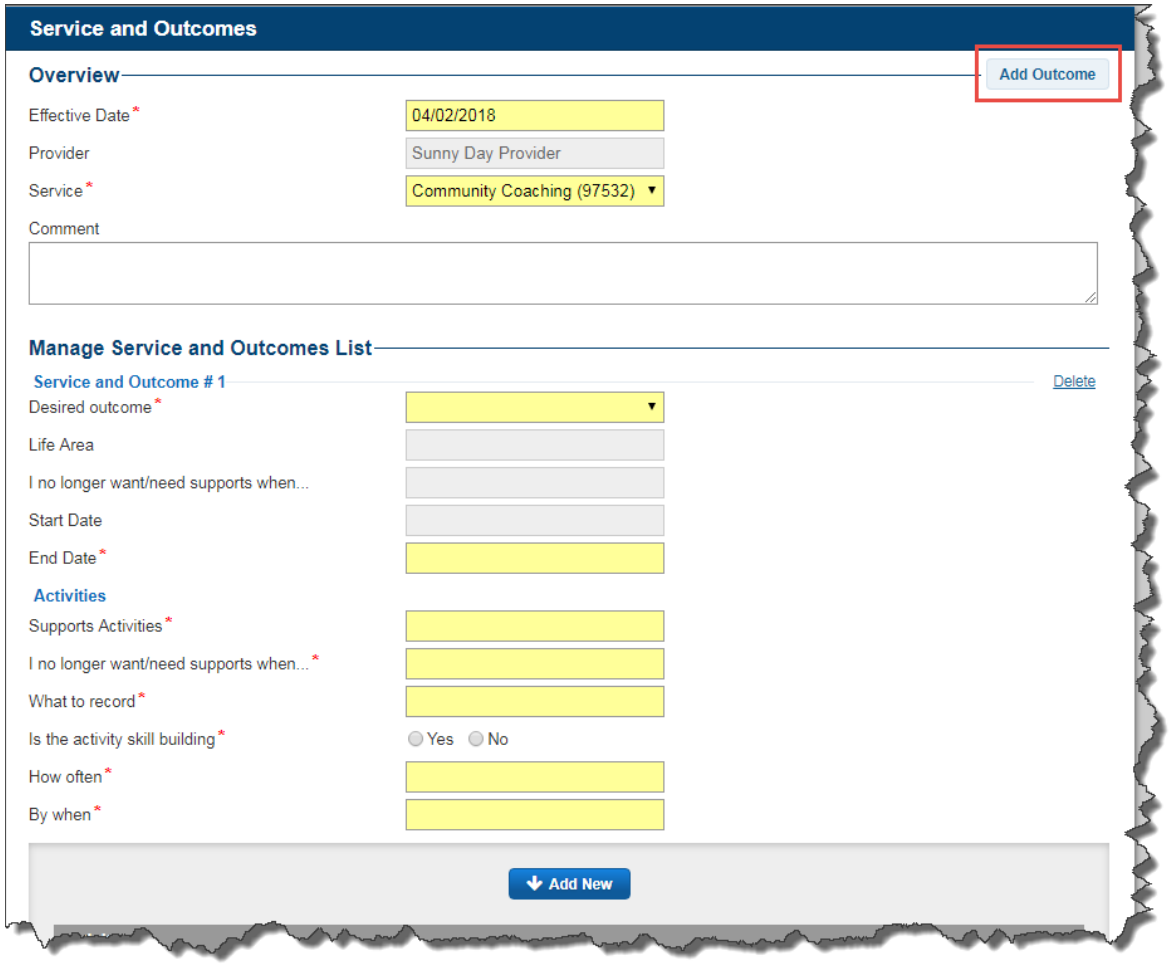


3. Click on **Edit** for *Service and Outcomes. The Service and Outcomes window opens.*

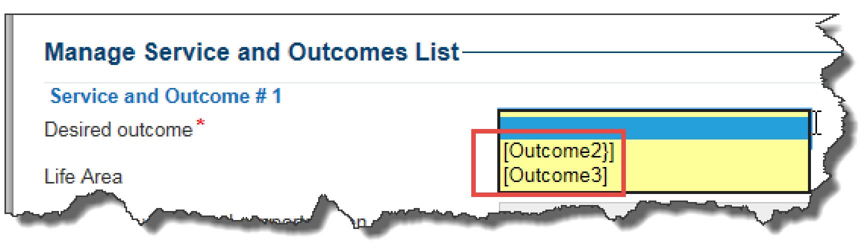


4. Add **Effective Date** and **Service** type for the *Overview* section.

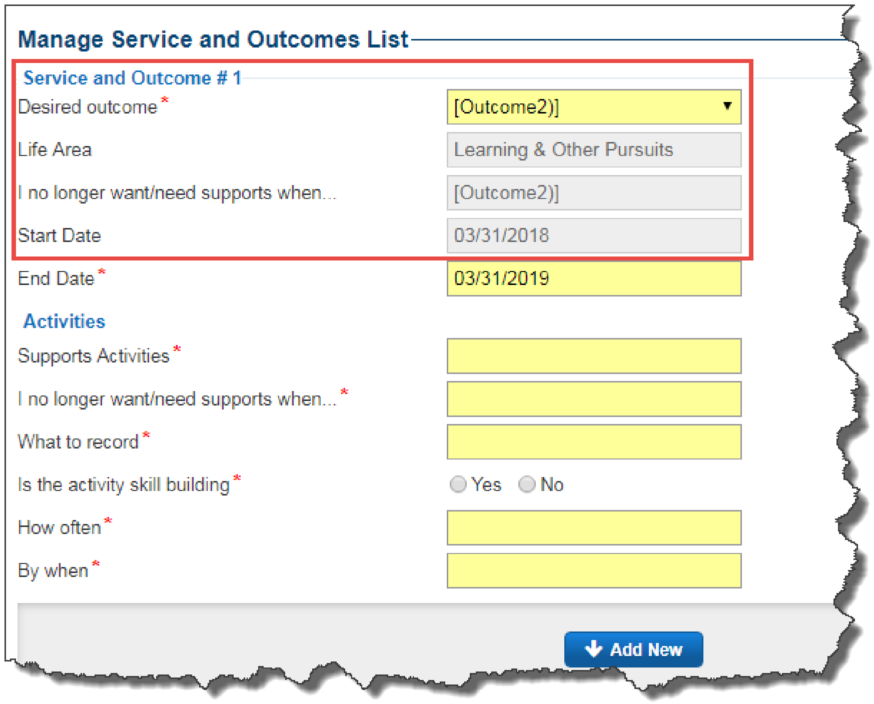
5. Click on **Add Outcome** (top right). *The "Manage Service and Outcomes List" is displayed below the Overview section.*



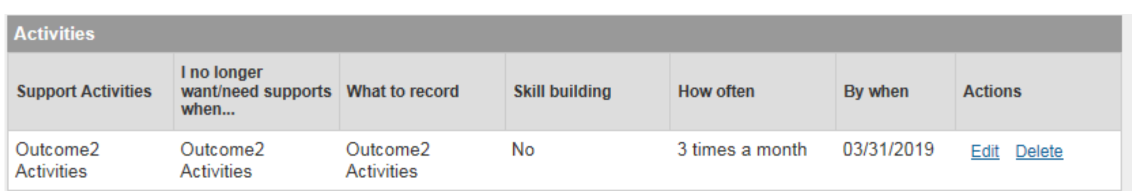
6. Click the **Desired Outcome** down arrow. *The outcomes assigned by the Support Coordinator in Part III are auto-populated.*



7. Select the appropriate **Desired outcome**. *The Life Area, I no longer want/need support when…,* and *Start Date sections are auto-populated and cannot be changed*.



8. Click in the **Supports Activities** field to type the appropriate information.
9. Click in the **I no longer want/need support when…** field to type the appropriate information.
10. Click in the **What to record** field to type the appropriate information.
11. Select **Yes** or **No** if the activity is or is not *skill building*.
12. Click in the **How often** field to type the appropriate information.
13. Click in the **By when** field to select the appropriate date.
14. Click on **Add New**. *The information is added to the Activities section.*

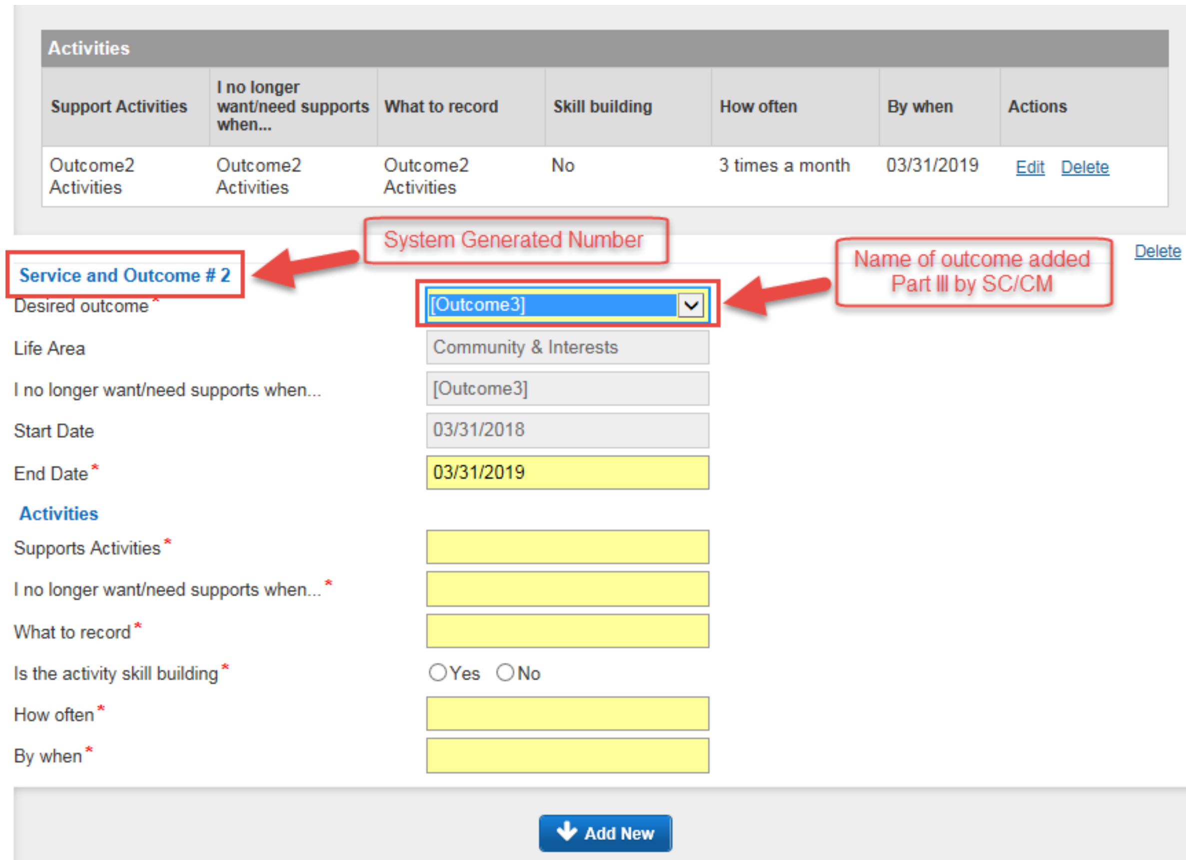

Activities

Support Activities	I no longer want/need supports when...	What to record	Skill building	How often	By when	Actions
Outcome2 Activities	Outcome2 Activities	Outcome2 Activities	No	3 times a month	03/31/2019	Edit Delete

15. Click on **Save**.

If there are additional outcomes to add scroll to the top and click on **Add Outcome**. *A new" Service and Outcome" section is added below the previous "Activities" section*

Note: Providers should add as many outcomes as are assigned in Part III to complete Part V.

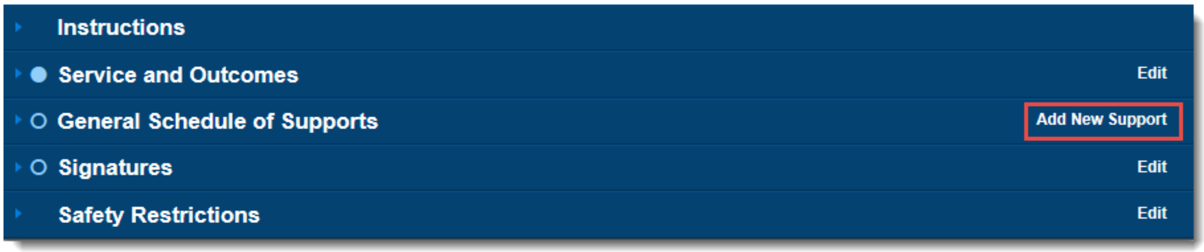


Note: If you disagree with an outcome, contact the Support Coordinator by phone to discuss and resolve. If alternate wording is needed, the language can be corrected in the revisions after completing the initial Part V.

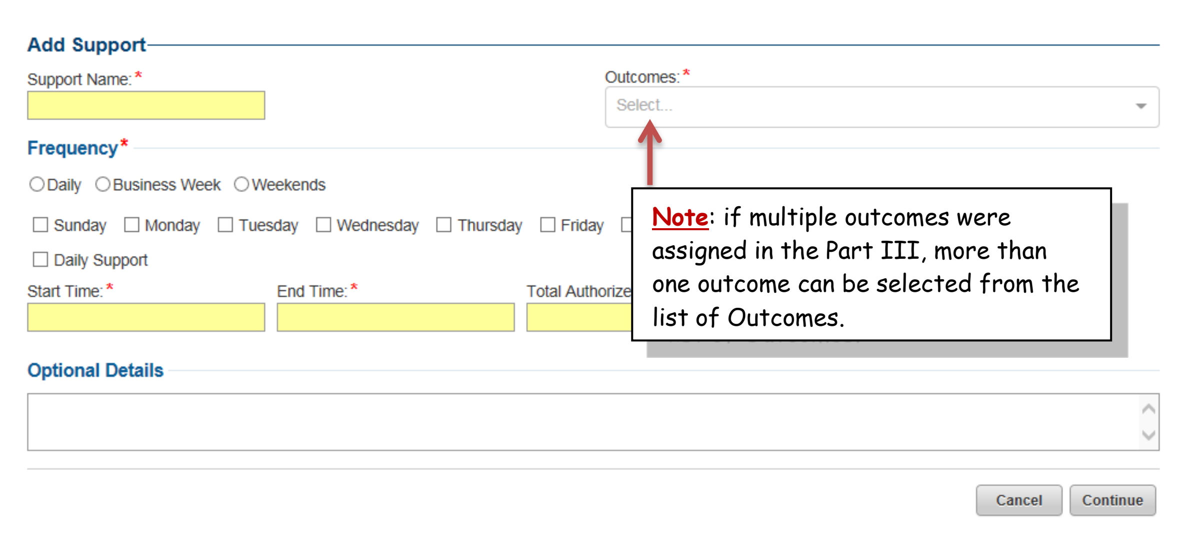
16. Follow steps 7-15 above to add the new outcome.

4.3.2 General Schedule of Supports

The *General Schedule of Supports* is a general blueprint of activities and supports, based on the person's preferences and routine. The authorized support time allotted to each group of activities is included in the authorized hours and totals sections. The *General Schedule of Supports* can be developed in various ways, but must include: support activities and outcome numbers, time frames for activities, as well as authorized totals.



1. Click on **Add New Support** for the *General Schedule of Supports* section. *The Add Support, Frequency and Optional Details window appears*



2. Click in **Support Name** field to provide a name for the support.
3. Click on **Select** in the *Outcomes* field to choose the appropriate outcome(s) for the support. *The Outcomes are automatically populated.*
4. Select the appropriate **Frequency:**
   - Daily = Sunday – Saturday
   - Business Week = Monday – Friday
   - Weekends = Sunday and Saturday
   - Daily Support = 24 hours (All Day)
5. Click in the **Start Time** and **End Time** fields to set the appropriate times for the support (if any day(s) of the week is selected).

Note: The days of the week can be selected individually.

If "Daily Support" is selected, you will not be able to select a start and end time for the support and it will not be calculated in the "Total Authorized Hours."

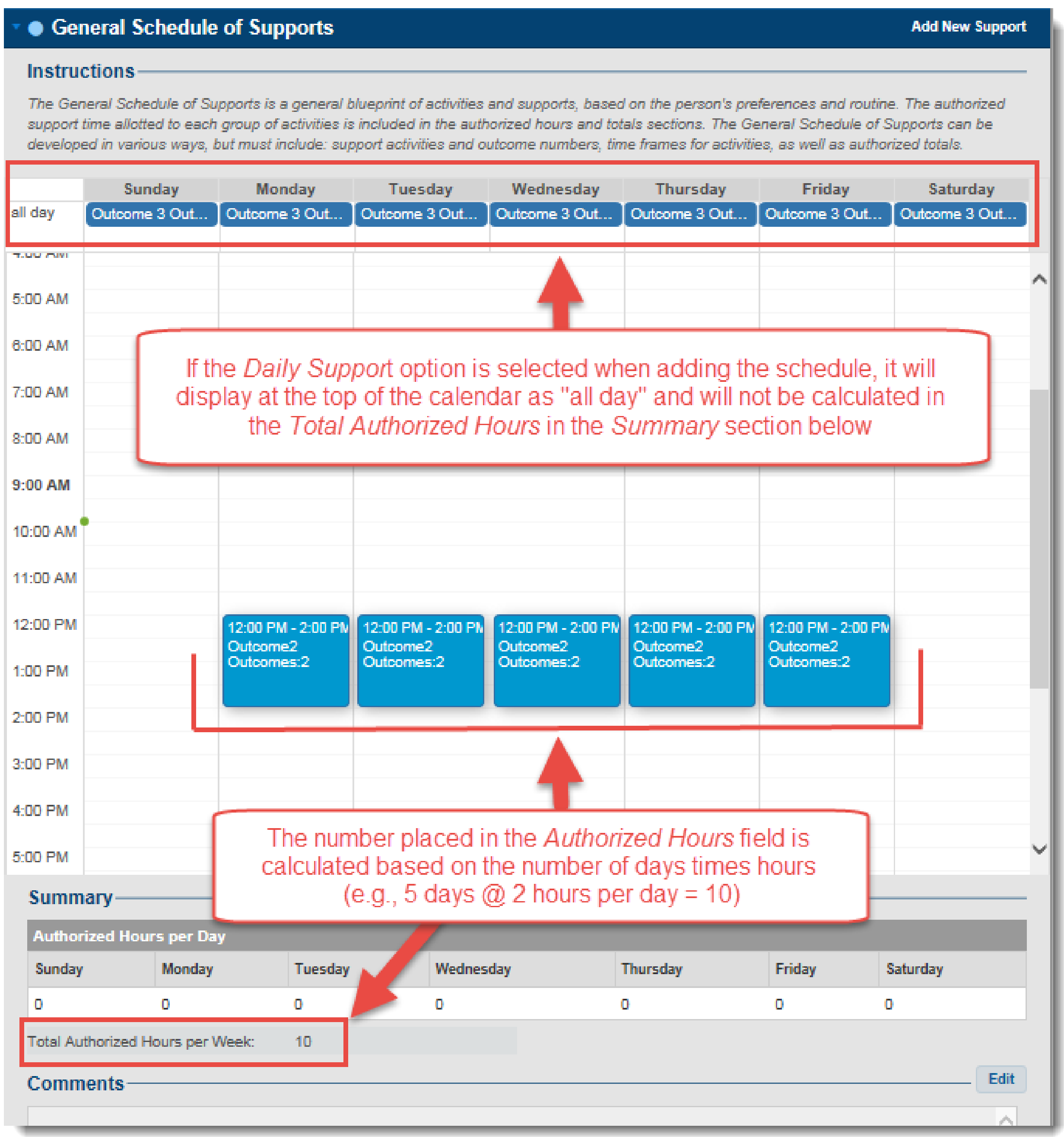
6. Click in the **Total Authorized Hours** to input the total of hours for the support.
7. Click on **Continue**.

> **Note**: The total authorized hours should be entered regardless of the particular services units and cannot exceed the total time between the start and end times.

4.3.2.1 General Schedule of Supports Calendar

To view the calendar for the added schedule:

1. Click on the **General Schedule of Supports** heading or the **Triangle**. *The calendar displays (see example below).*



4.3.2.2 Print Schedule of Supports

See section 4.9.2 (*Print Part V*) for printing the calendar for the General Schedule of Supports.

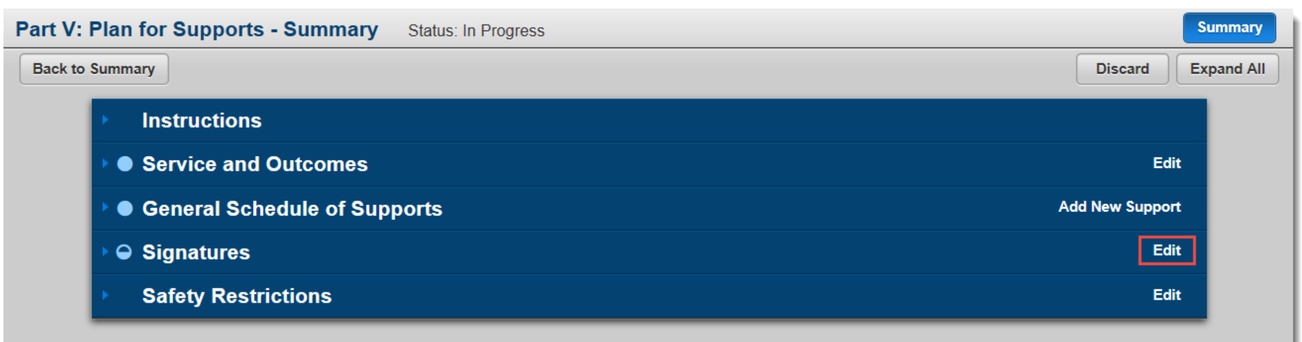
4.3.2.3 Edit Schedule of Supports

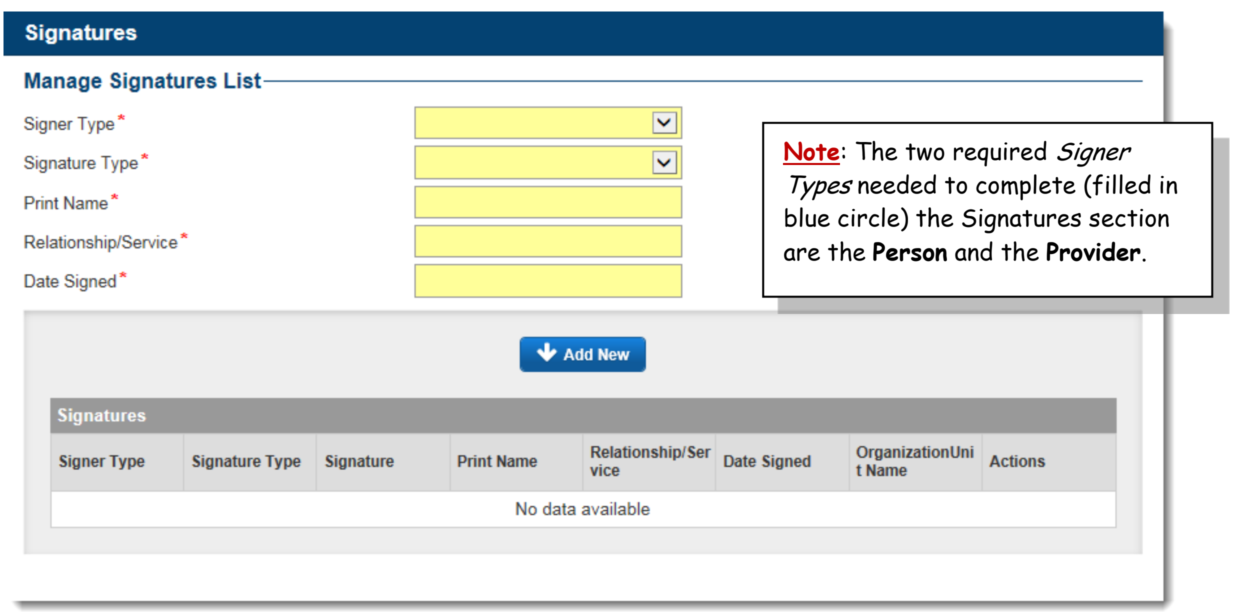
1. From the calendar view, click on the outcome to be edited. *The Edit Support window appears.*
2. Make appropriate changes.
3. Click on **Continue**. *Changes are saved.*

4.3.3 Signatures

As with signatures *in Part IV*, signatures in *Part V* should also be kept on file and denoted as such in WaMS.

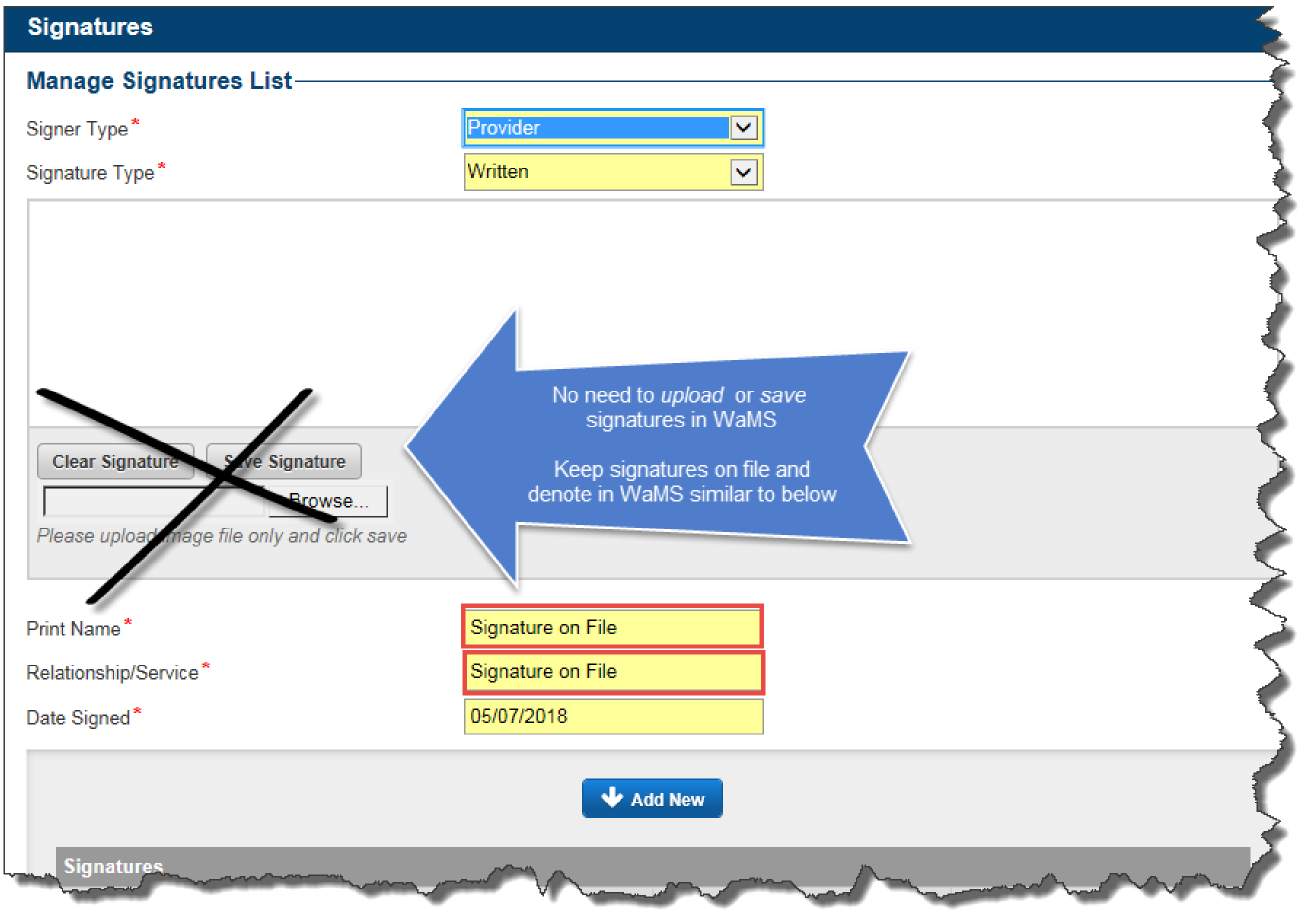
1. Click on **Edit** for *Signatures*. *The Signature window appears.*





To Add Details for Signature on File:

a. Click on the **Signer Type** drop down arrow to select the appropriate signer (*Person, Substitute Decision Maker, Provider, Family, Friend or Other*).
b. Click on the **Signature Type** drop down and select **Written**.



c. In the **Print Name** field type **Signature on File**.
d. In the **Relationship/Service** field type **Signature on File**.
e. Select the **Date Signed**.
f. Click on the **Add New** button.
g. Click on **Save**. *The signature is added to the ISP and the ISP Main page reappears.*

i. Note: The signature will be displayed as "**No Signature Uploaded**".

Signatures							
Signer Type	Signature Type	Signature	Print Name	Relationship/Service	Date Signed	OrganizationUnit Name	Actions
Provider	Written	No Signature Uploaded	Signature on File	Signature on File	05/07/2018	Provider - Sunny Day	Edit Remove

A signature can also be denoted in WaMS if an individual contributor to the plan is not available to sign during the planning meeting but has agreed to the plan.

When Contributor not here for planning:

Note: The Provider is listed in the "Signer Type" when logged in WaMS with the "Provider ISP Approver" role.

a. In the *Manage Signatures List*, click on the **Signer Type** drop down arrow to select the appropriate signer (*Person, Substitute Decision Maker, Provider, Family, Friend or Other*).
b. Click on the **Signature Type** drop down and select **Contributor not here for planning**.
c. Type in the name of the person signing in the **Print Name** field.
d. Type in the **Relationship/Service**.
e. Click on the **Add New** button.

Signer Type *	Family
Signature Type *	Contributor not here for plannii
Print Name *	John Hypes
Relationship/Service *	Father

The information for the contributor is added to the Signatures area.

Signatures							
Signer Type	Signature Type	Signature	Print Name	Relationship/Service	Date Signed	OrganizationUnit Name	Actions
Provider	Written	No Signature Uploaded	Signature on File	Signature on File	05/07/2018	Provider - Sunny Day	Edit Remove
Family	Contributor not here for planning	No Signature Uploaded	John Hypes	Father	05/07/2018	Provider - Sunny Day	Edit Remove

f. Click on **Save**. *The contributor information is added to the Part V signature and the ISP Main page reappears.*

Individual Support Plan - Signatures

Manage

Back to Summary

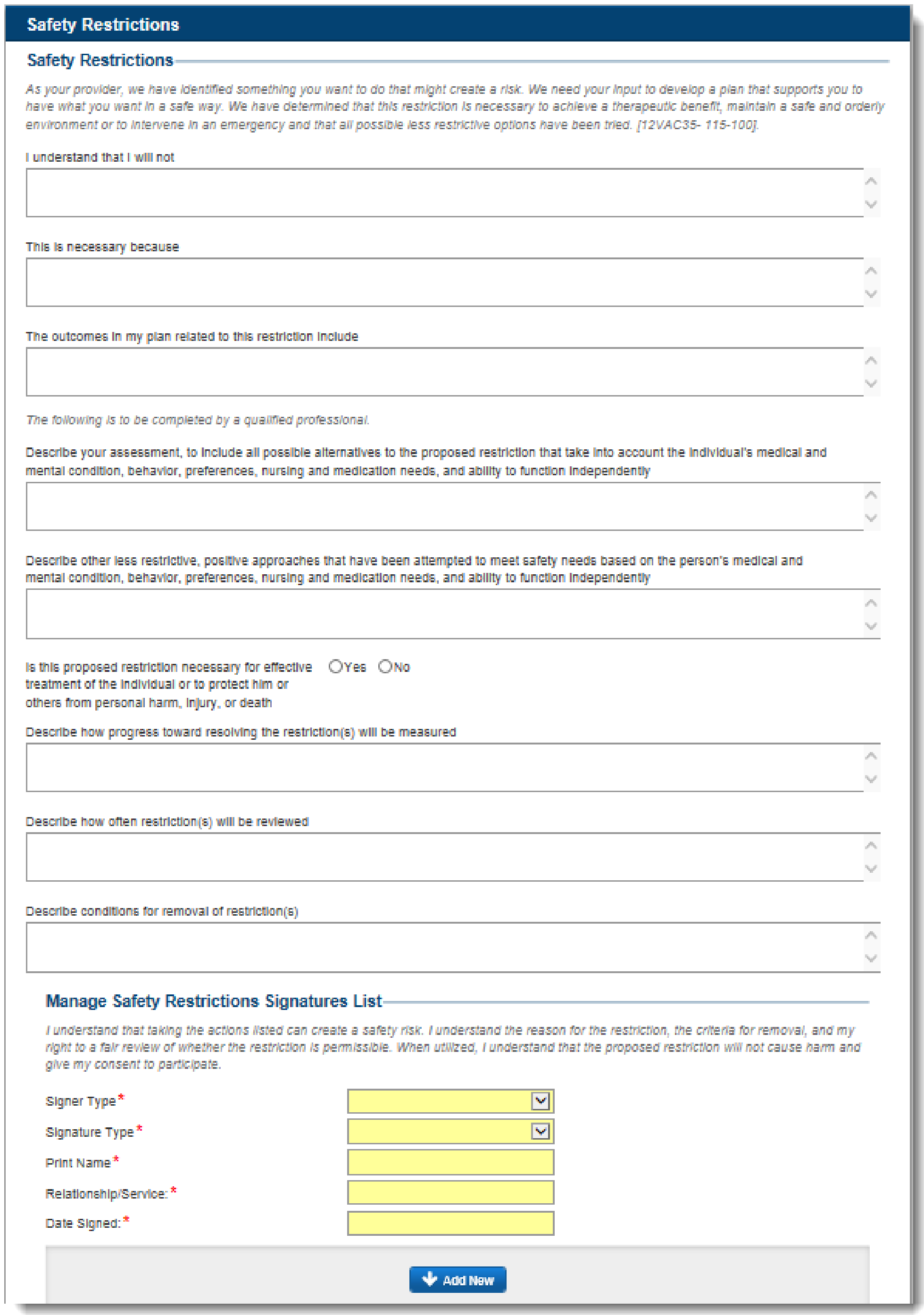
Note: Be sure to **Save** signatures BEFORE going back to the *Summary* page after clicking on the *Add New* button when adding signatures.

Save

4.3.4 Safety Restrictions

The **Safety Restrictions** section should be completed if any risks resulting in a restriction on the freedoms of everyday life are identified for the individual.

1. Click on **Edit** for *Safety Restrictions. The Safety Restrictions window appears.*



Safety Restrictions

Safety Restrictions

As your provider, we have identified something you want to do that might create a risk. We need your input to develop a plan that supports you to have what you want in a safe way. We have determined that this restriction is necessary to achieve a therapeutic benefit, maintain a safe and orderly environment or to intervene in an emergency and that all possible less restrictive options have been tried. [12VAC35- 115-100].

I understand that I will not

This is necessary because

The outcomes in my plan related to this restriction include

The following is to be completed by a qualified professional.

Describe your assessment, to include all possible alternatives to the proposed restriction that take into account the individual's medical and mental condition, behavior, preferences, nursing and medication needs, and ability to function independently

Describe other less restrictive, positive approaches that have been attempted to meet safety needs based on the person's medical and mental condition, behavior, preferences, nursing and medication needs, and ability to function independently

Is this proposed restriction necessary for effective treatment of the individual or to protect him or others from personal harm, injury, or death ○Yes ○No

Describe how progress toward resolving the restriction(s) will be measured

Describe how often restriction(s) will be reviewed

Describe conditions for removal of restriction(s)

Manage Safety Restrictions Signatures List

I understand that taking the actions listed can create a safety risk. I understand the reason for the restriction, the criteria for removal, and my right to a fair review of whether the restriction is permissible. When utilized, I understand that the proposed restriction will not cause harm and give my consent to participate.

Signer Type*

Signature Type*

Print Name*

Relationship/Service:*

Date Signed:*

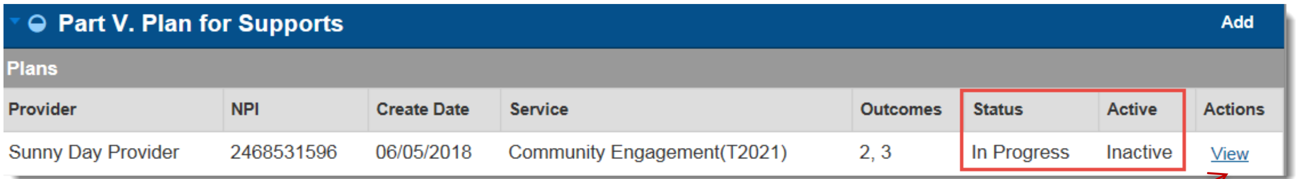
Add New

2. Complete each section as necessary.

3. Add signatures to the **Manage Safety Restrictions Signature List** (*follow steps in Section 4.3.3 Signatures above*).

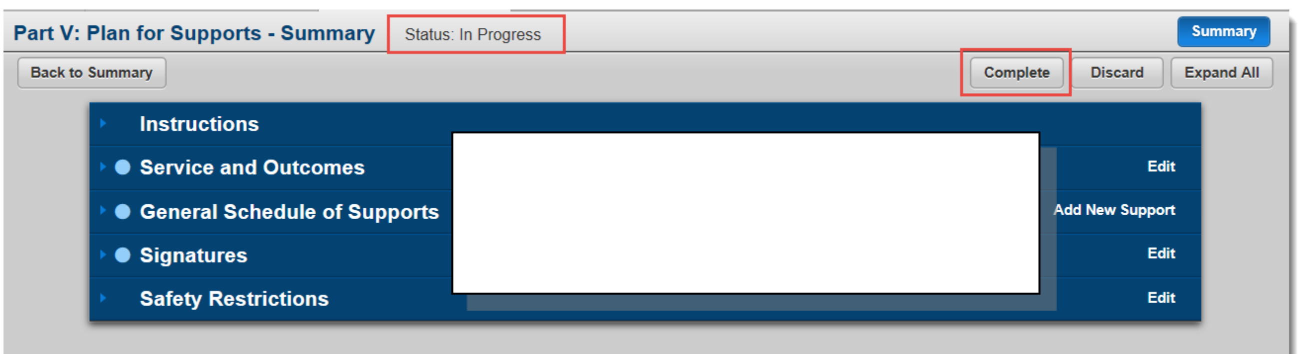
4.3.5 Complete Part V

Until the *Part V* is completed by the provider, the status shows as *In Progress* and the *Part V* is considered *Inactive.*

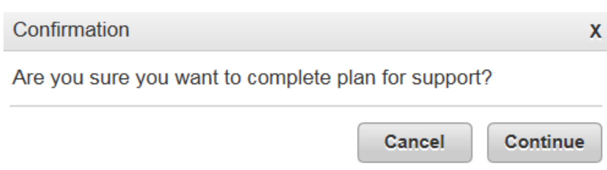


Click on View if necessary to open, view or edit the Part V – Plan for Supports.

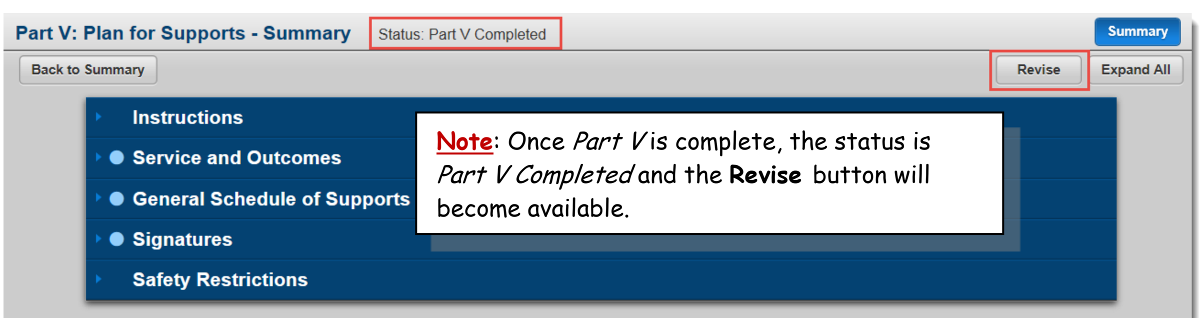
Once all of the sections in *Part V* have been entered and finalized (*filled in blue circles*) the provider can *Complete* the *Part V*.



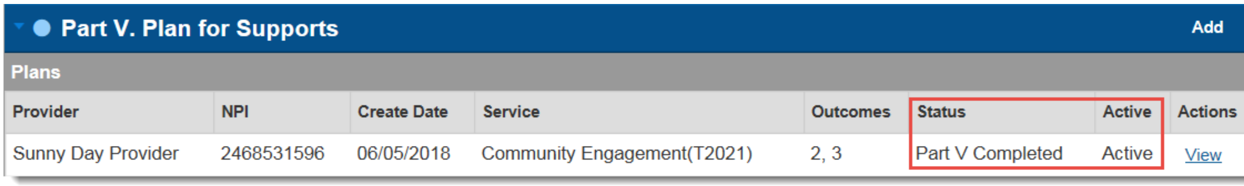
1. Click on **Complete**. *The Confirmation dialog box appears.*



2. Click on **Continue**.



3. Click on **Back to Summary** to go back to the main *ISP Summary* page.
4. Click on the **Part V. Plan for Supports** heading or the **Triangle** to expand the section to see details.



Provider	NPI	Create Date	Service	Outcomes	Status	Active	Actions
Sunny Day Provider	2468531596	06/05/2018	Community Engagement(T2021)	2, 3	Part V Completed	Active	View

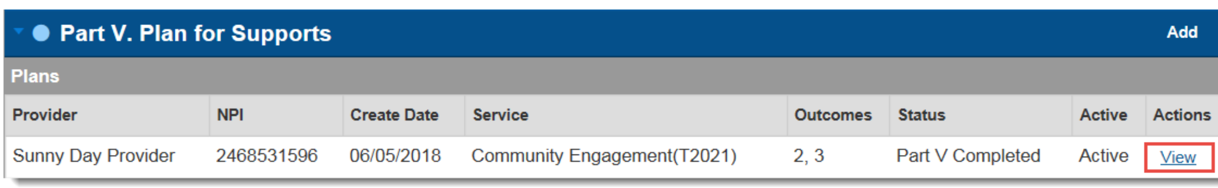
When the *Part V* has been completed by the provider, the status shows as *Part V Completed* and the *Part V* is considered *Active.*

4.3.6 Revise Part V

When a provider removes or adds an outcome in outcome in *Part V*, the revisions must be submitted to the Support Coordinator to *approve* or *reject* the revisions. Additionally, the Support Coordinator can *submit* the revisions back to the provider for further details and changes.

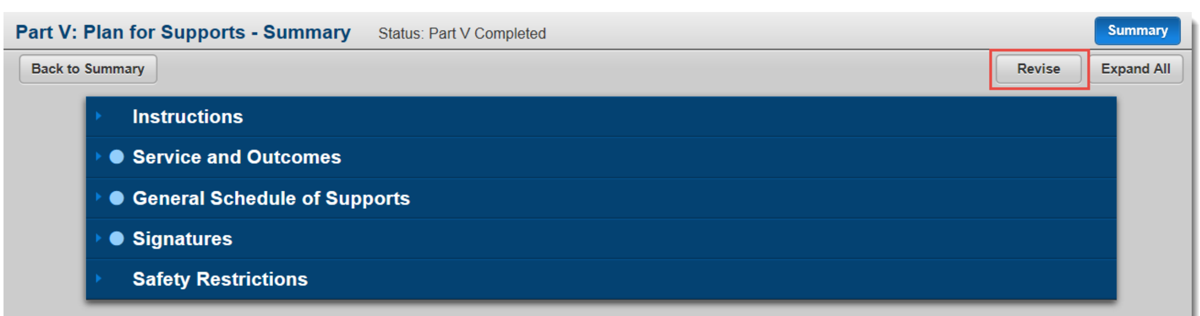
Note: When the Part V is revised, both the provider and the individual must sign the Part V again.

1. Click on the **Part V. Plan for Supports** heading or the **Triangle** to expand the section.

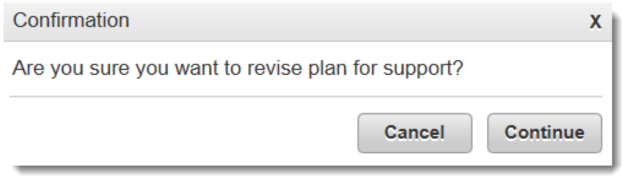


Provider	NPI	Create Date	Service	Outcomes	Status	Active	Actions
Sunny Day Provider	2468531596	06/05/2018	Community Engagement(T2021)	2, 3	Part V Completed	Active	View

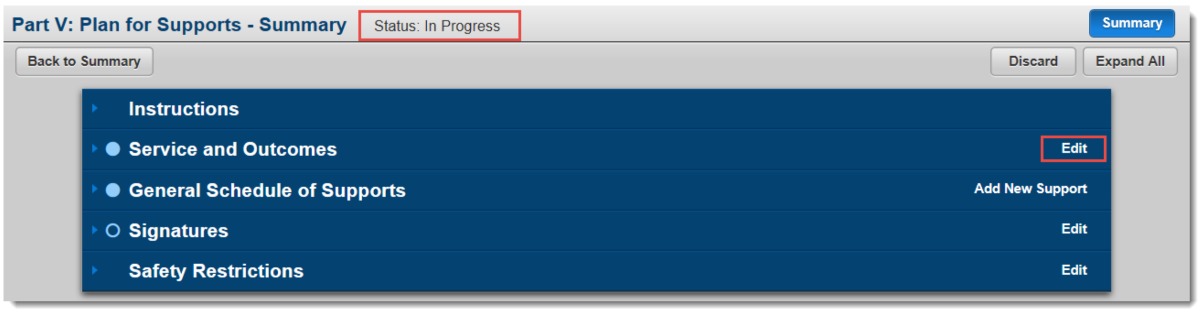
2. Click on **View**. The *Part V – Plan for Supports. – Summary* window opens



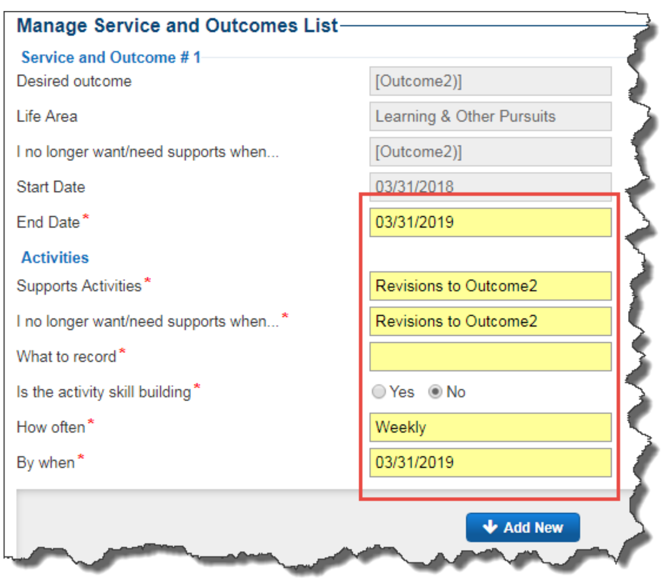
3. Click on **Revise**. *The Confirmation dialog box appears.*



4. Click on **Continue**. *The Part V: Plan for Supports window opens. The status changes from Completed to In Progress.*



5. Click on **Edit** for *Services and Outcomes.*
6. Make the necessary changes *(see example highlighted below)*:



Note: Once established, outcomes can be *ended* early and replaced by *adding* a new outcome. An existing outcome cannot be changed.

The provider will not be able make to changes to the following information when revising a Part V outcome:

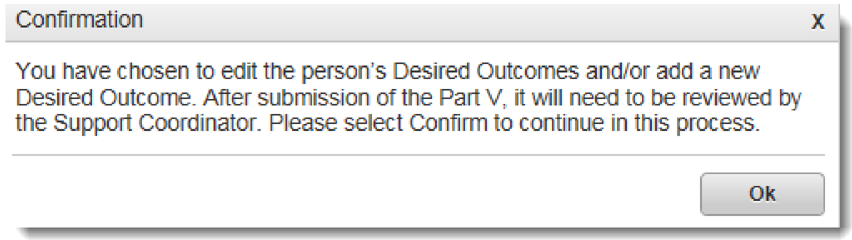
- Desired Outcome name
- Life Area
- I no longer want/need supports when...
- Start Date

The provider will be able to:

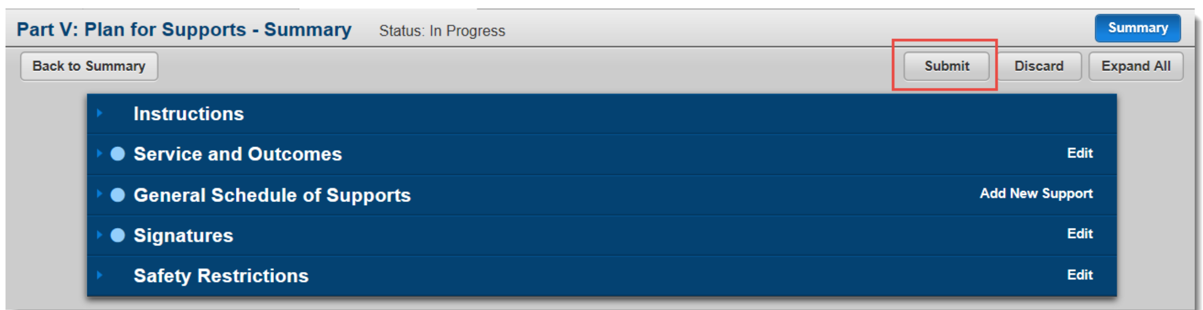
- Revise Activities for the existing outcome
- Revise the end date of an existing outcome
- Add a new outcome

7. Click on **Add New**. *The information is added as a new line to the Activities Section.*

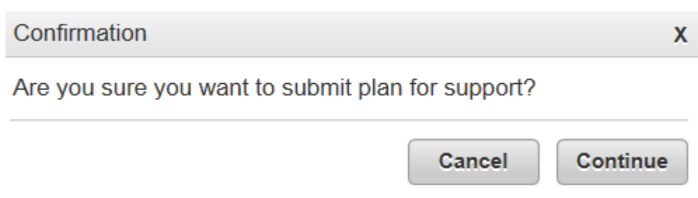
8. Click on **Save** (top right). *The Confirmation dialog box appears.*



9. Click on **OK**. *The Part V: Plan for Supports – Summary window appears. The status for the Part V is "In Progress".*
10. Click on **Edit** for the *Signatures* section to add required signatures to *Part V* (*follow steps in Section 4.3.3 Signatures above*).
11. Click on **Back to Summary** to return to the main *Part V: Plan for Supports – Summary* window.

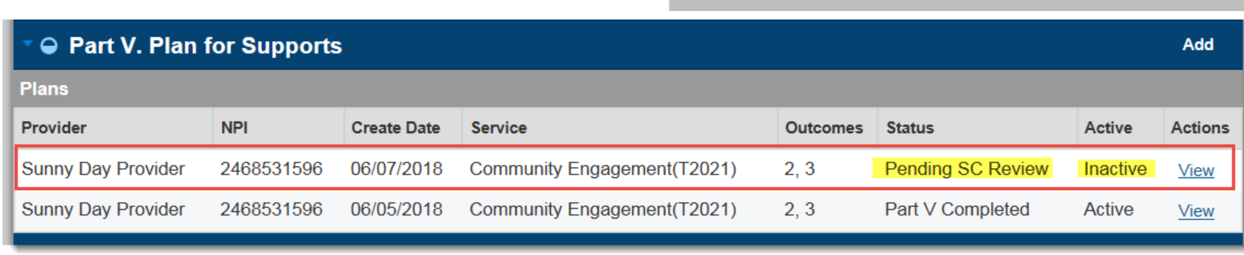


12. Click on **Submit**. *The Confirmation dialog box appears.*



13. Click on **Continue**. *The revised outcome is listed as a new line and the status changes to Pending SC Review for the Part V and is Inactive.*

Note: An Alert will be sent to the Support Coordinator stating the provider has submitted a plan for support (to approve, reject or submit back to provider).



When the Support Coordinator reviews and *submits* (i.e., does not *approve* or *reject* the revisions) back to the provider for further details and changes, the Provider receives an *Alert* stating "*the SC/CSB has reviewed plan for support*" and Status is *Pending Provider Review*.

4.3.7 Status Line for Part V - Plan of Supports

The Status of Part V. Plan of Supports created by the Provider(s)	
Status	**Description**
In Progress	The initial status of a new Part V that the Provider created by either *adding* a new, or *revising* an already completed Part V
Part V Completed	The status of a Part V when it is completed by the Provider
All Part Vs Completed For The Provider	The status of a Part V when a Provider completes *all* Part Vs for *all* Part III outcomes associated with that Provider
Pending SC Review	The status of a Part V when a Provider *Submits* a *Revised* Part V
Pending Provider Review	The status of a Part V when the Support Coordinator submits a Part V that is in *Pending SC Review*
Approved	The status of a Part V when the Support Coordinator approves a Part V that is in *Pending SC Review* *The Provider receives an Alert, and Status of the revised outcome changes to Approved and is Active.*
Discarded	1. The status of a Part V when a Provider discards a Part V that is *In Progress* 2. The status of a Part V when a Provider discards a Part V that is *Pending SC Review* 3. The status of a Part V when a Provider discards a Part V that is *Pending Provider Review*
Rejected	The status of a Part V when the Support Coordinator rejects a Part V that is in *Pending SC Review* *The Provider receives an Alert, the Status changes to Inactive and the previous / revised outcome becomes Active again.*

4.4 Part V. Plan for Supports – Modified Use

Providers use WaMS to enter a *summary* of support activities, skill building information, and a target date per outcome for *Part V*. A copy of their own *Part V* should be uploaded in the *Attachments* section (*see Section 4.5 below for steps for uploading attachments*).

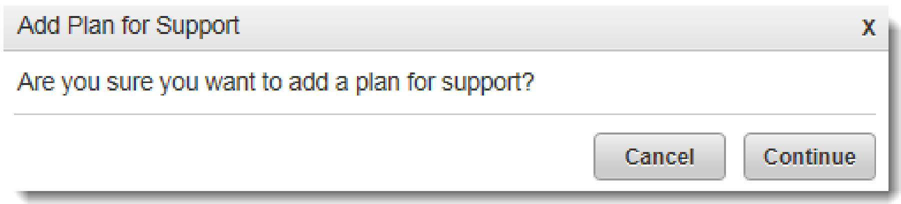
Once the Support Coordinator adds an outcome for a provider, the *Part V* section will be available in WaMS for that provider to add their summary of support.

Note: It is a good idea to view *Part III – Shared Planning* to see the desired outcome(s) that have been assigned by the Support Coordinator.

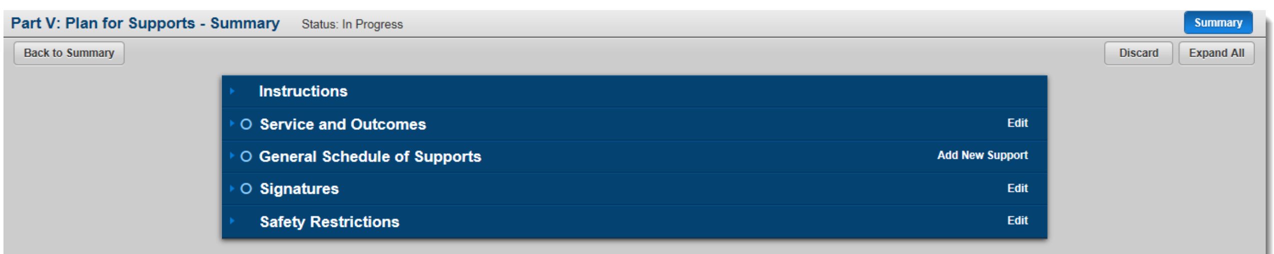
Providers use WaMS to request outcome changes in the ISP for an individual. (*See section 4.3.6. – Revise ISP*).

4.4.1 Add Part V to ISP

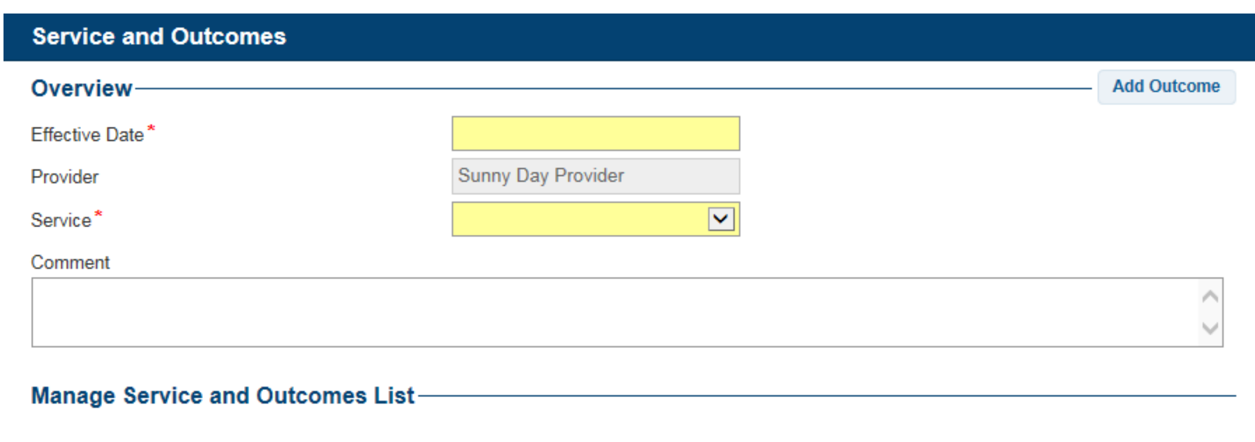
1. Click on the **Add** for *V. Plan for Supports. The Add Plan for Support dialog box appears.*



2. Click on **Continue**. *The Part V: Plan for Supports – Summary page appears.*

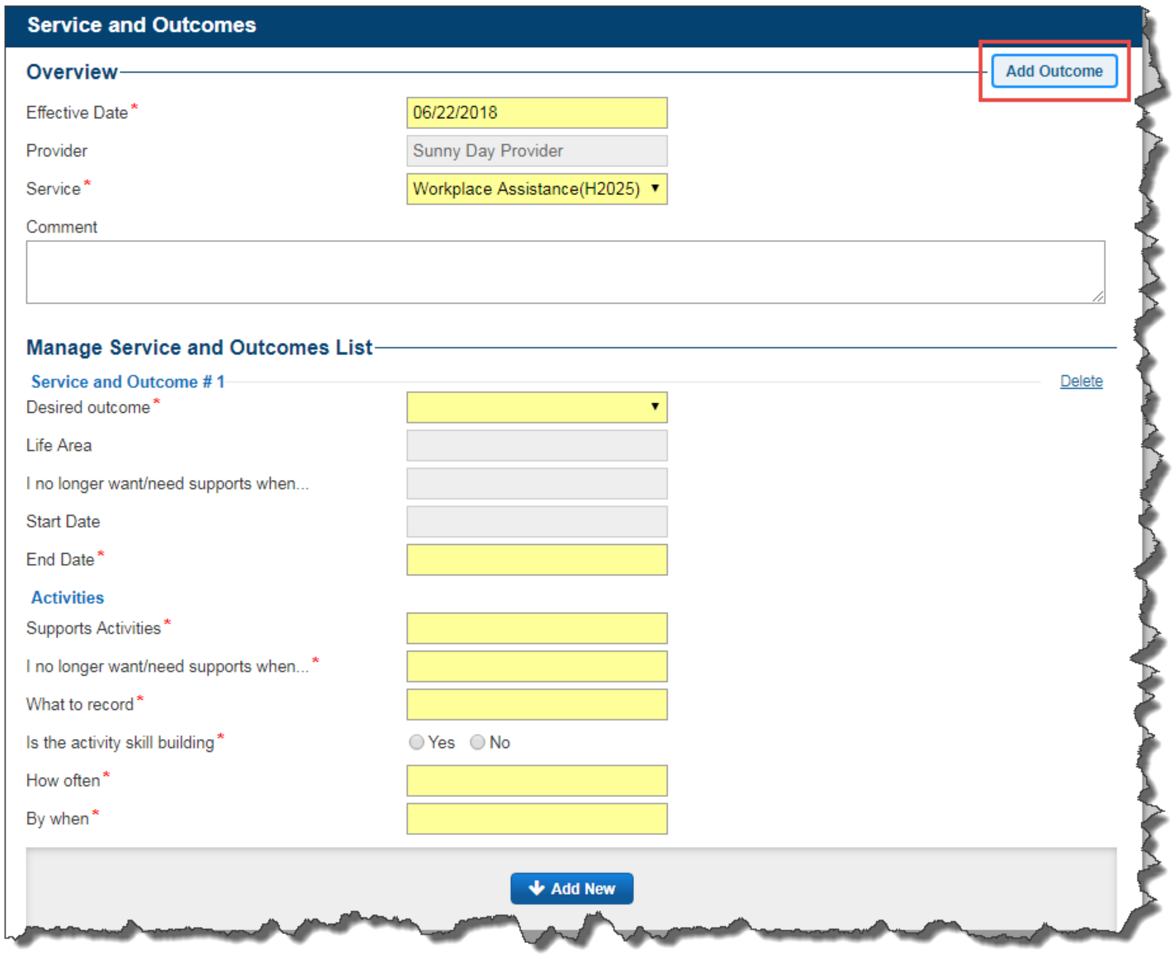


3. Click on **Edit** for *Service and Outcomes. The Service and Outcomes window opens.*

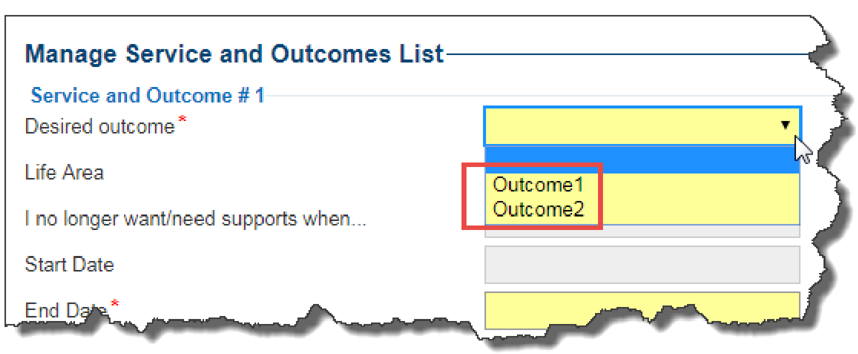


4. Add **Effective Date** and **Service** type for the *Overview* section.

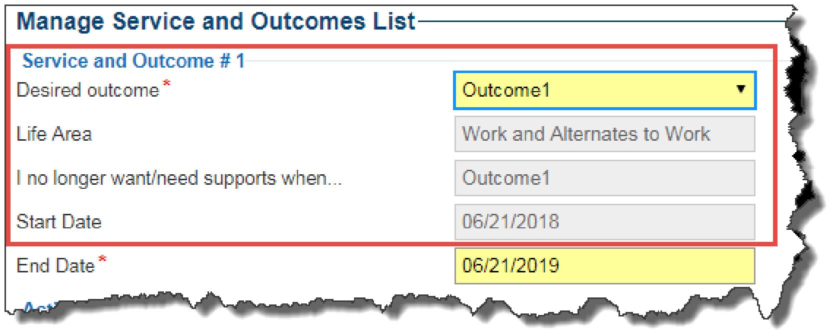
5. Click on **Add Outcome** (top right). *The "Manage Service and Outcomes List" is displayed below the Overview section.*



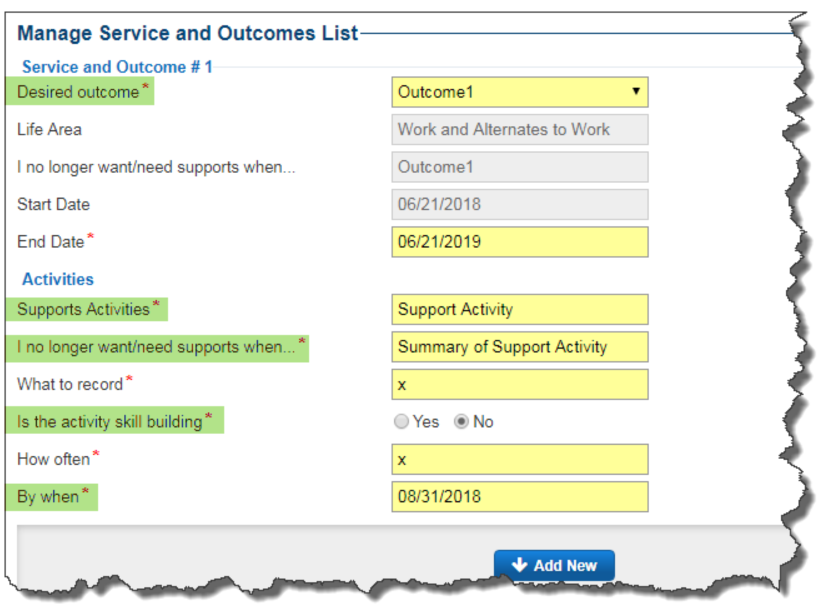
6. Click the **Desired Outcome** down arrow. *The outcomes assigned by the Support Coordinator in Part III are auto-populated.*



7. Select the appropriate **Desired outcome**. *The Life Area, I no longer want/need support when…,* and *Start Date sections are auto-populated and cannot be changed*.



8. Click in the **Supports Activities** field to type the activity information.
9. Click in the **I no longer want/need support when…** field to type a **summary** of support activity.
10. Place an "**X**" in the **What to record** field.
11. Select **Yes** or **No** if the activity is or is not *skill building*.
12. Place an "**X**" in the **How often** field to type the appropriate information.
13. Click in the **By when** field to select the appropriate date.



14. Click on **Add New**. *The information is added to the Activities section.*

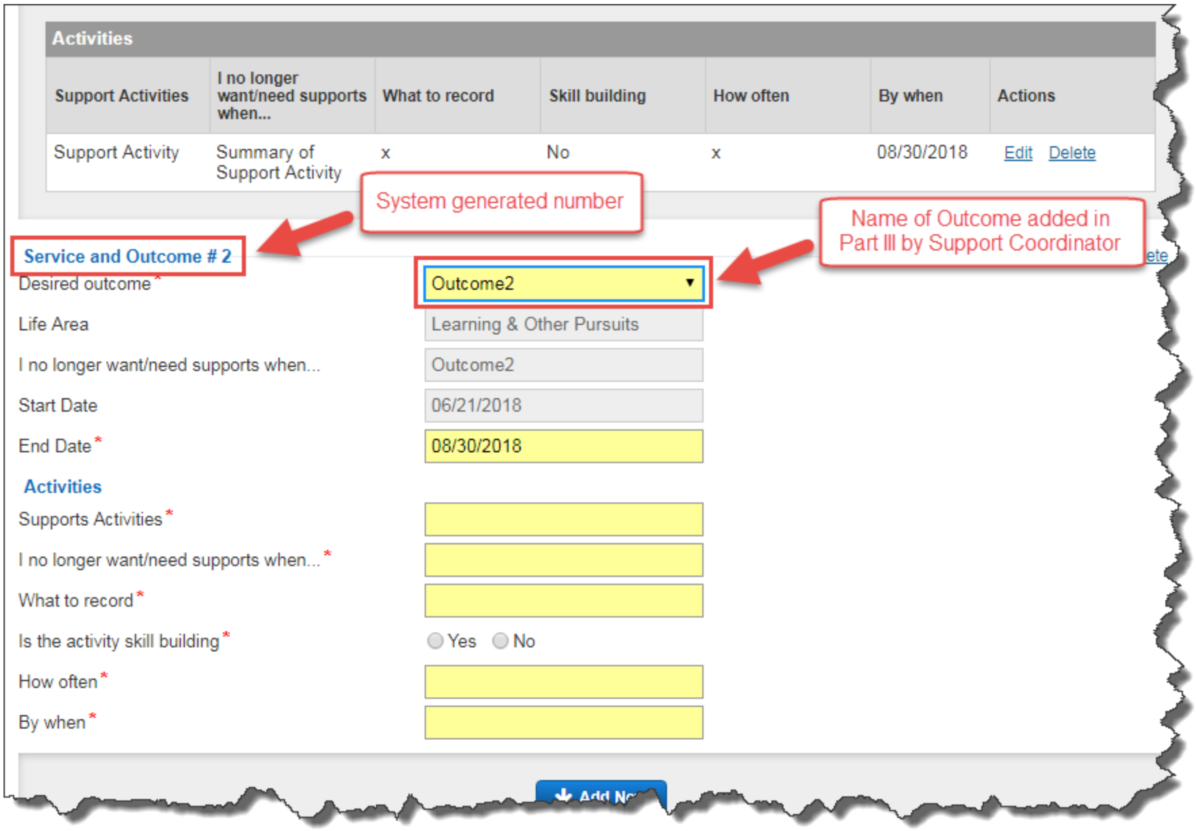
Activities

Support Activities	I no longer want/need supports when...	What to record	Skill building	How often	By when	Actions
Support Activity	Summary of Support Activity	x	No	x	08/31/2018	Edit Delete

15. Click on **Save**.

If there are additional outcomes to add scroll to the top and click on **Add Outcome**. *A new" Service and Outcome" section is added below the previous "Activities" section*

> <u>**Note**</u>: Providers should add as many outcomes as are assigned in Part III to complete Part V.

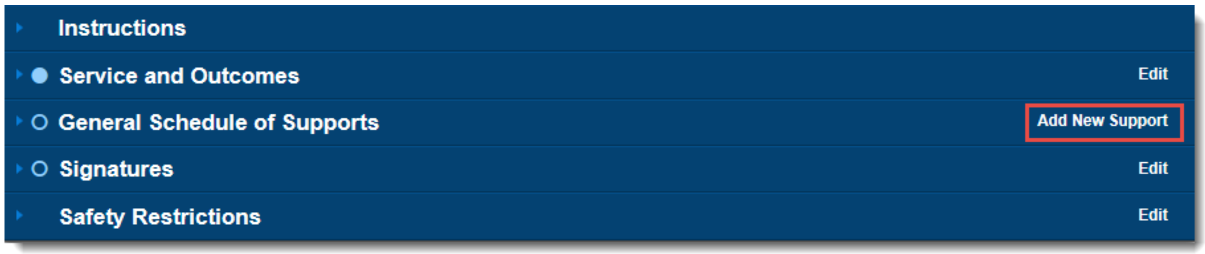


16. Follow steps 7-15 above to add the new outcome.

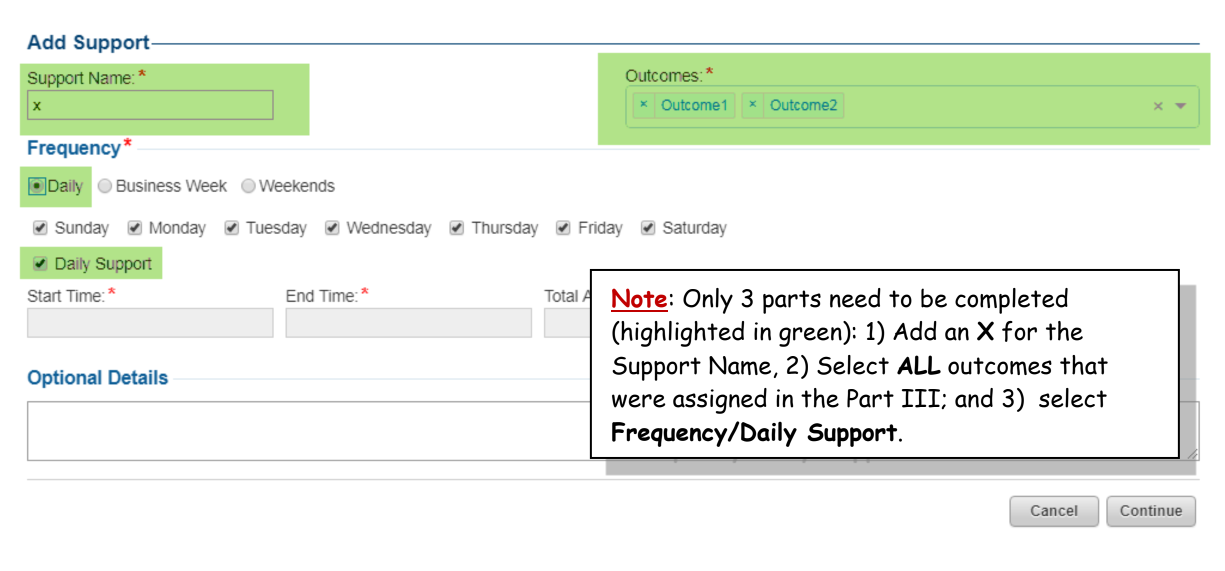
> <u>**Note**</u>: If you disagree with an outcome, contact the Support Coordinator by phone to discuss and resolve. If alternate wording is needed, the language can be corrected in the revisions <u>after</u> completing the initial Part V.

4.4.2 General Schedule of Supports

The *General Schedule of Supports* is not required for the *Part V - Modified Use* ; however in order to officially complete *Part V* in *WaMS*, it must be added. See steps below:



1. Click on **Add New Support** for the *General Schedule of Supports* section. *The Add Support, Frequency and Optional Details window appears*

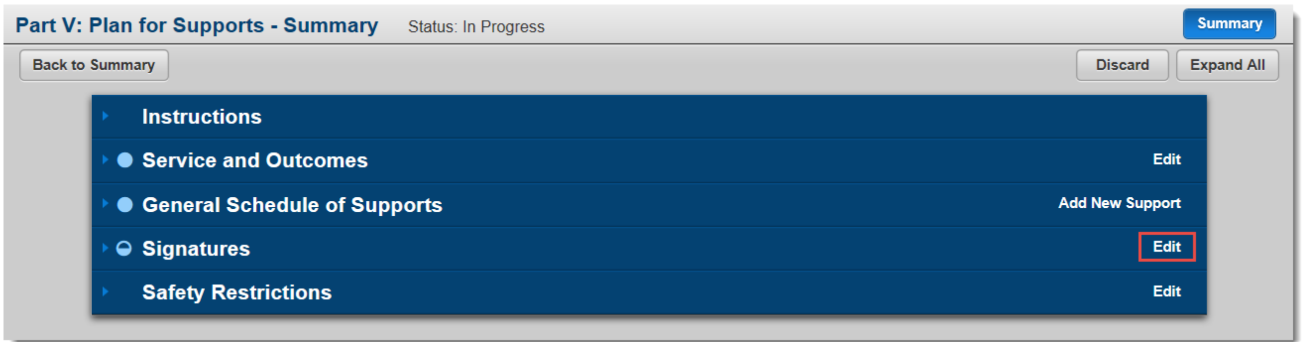


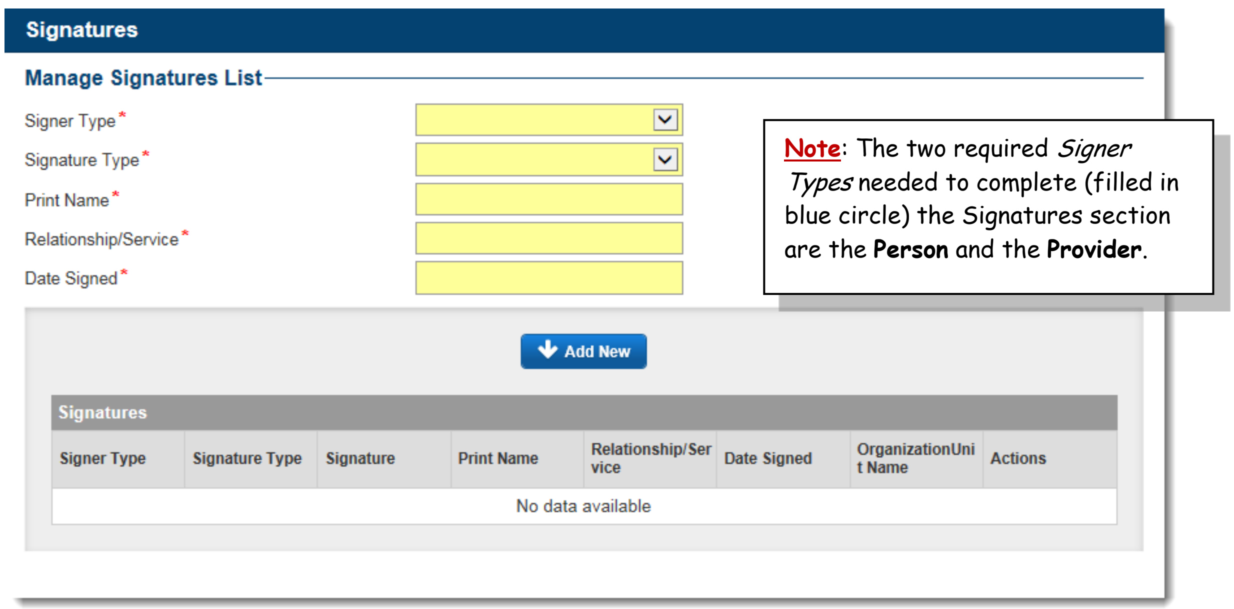
2. Place an "**X**" in the **Support Name** field.
3. Click on **Select** in the *Outcomes* field to choose ALL of the outcome(s) listed. *The Outcomes are automatically populated.*
4. Select the **Frequency:**
    - Daily (Sunday – Saturday auto-selected)
    - Daily Support (24 hours / All Day)
5. Click on **Continue**.

4.4.3 Signatures

As with signatures *in Part IV*, signatures in *Part V* should also be kept on file and denoted as such in WaMS.

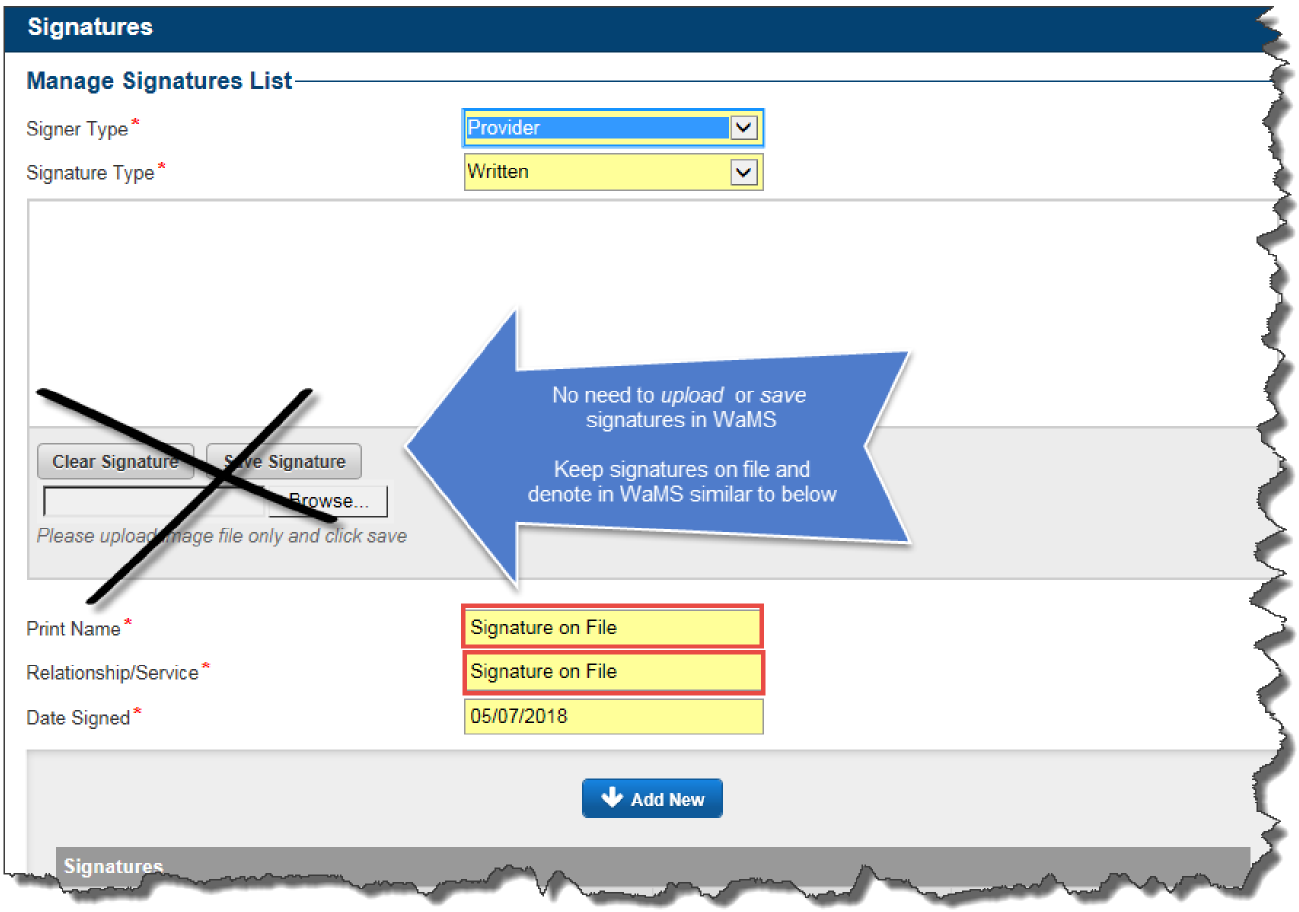
1. Click on **Edit** for *Signatures. The Signature window appears.*





To Add Details for Signature on File:

a. Click on the **Signer Type** drop down arrow to select the appropriate signer (*Person, Substitute Decision Maker, Provider, Family, Friend or Other*).
b. Click on the **Signature Type** drop down and select **Written**.



c. In the **Print Name** field type **Signature on File**.
d. In the **Relationship/Service** field type **Signature on File**.
e. Select the **Date Signed**.
f. Click on the **Add New** button.
g. Click on **Save**. *The signature is added to the ISP and the ISP Main page reappears.*

i. Note: The signature will be displayed as "**No Signature Uploaded**".

Signatures							
Signer Type	**Signature Type**	**Signature**	**Print Name**	**Relationship/Service**	**Date Signed**	**OrganizationUnit Name**	**Actions**
Provider	Written	No Signature Uploaded	Signature on File	Signature on File	05/07/2018	Provider - Sunny Day	Edit Remove

A signature can also be denoted in WaMS if an individual contributor to the plan is not available to sign during the planning meeting but has agreed to the plan.

When Contributor not here for planning:

a. In the *Manage Signatures List*, click on the **Signer Type** drop down arrow to select the appropriate signer (*Person, Substitute Decision Maker, Provider, Family, Friend or Other*).

> Note: The Provider is listed in the "Signer Type" when logged in WaMS with the "Provider ISP Approver" role.

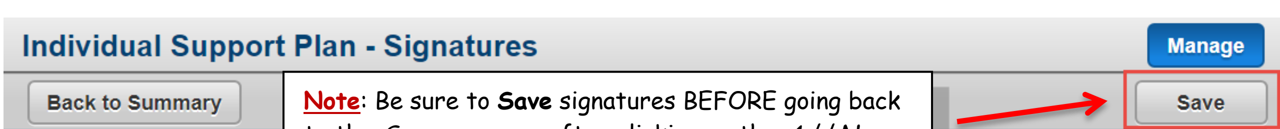
b. Click on the **Signature Type** drop down and select **Contributor not here for planning**.
c. Type in the name of the person signing in the **Print Name** field.
d. Type in the **Relationship/Service**.
e. Click on the **Add New** button.

Signer Type*	Family
Signature Type*	Contributor not here for plannii
Print Name*	John Hypes
Relationship/Service*	Father

The information for the contributor is added to the Signatures area.

Signatures							
Signer Type	**Signature Type**	**Signature**	**Print Name**	**Relationship/Service**	**Date Signed**	**OrganizationUnit Name**	**Actions**
Provider	Written	No Signature Uploaded	Signature on File	Signature on File	05/07/2018	Provider - Sunny Day	Edit Remove
Family	Contributor not here for planning	No Signature Uploaded	John Hypes	Father	05/07/2018	Provider - Sunny Day	Edit Remove

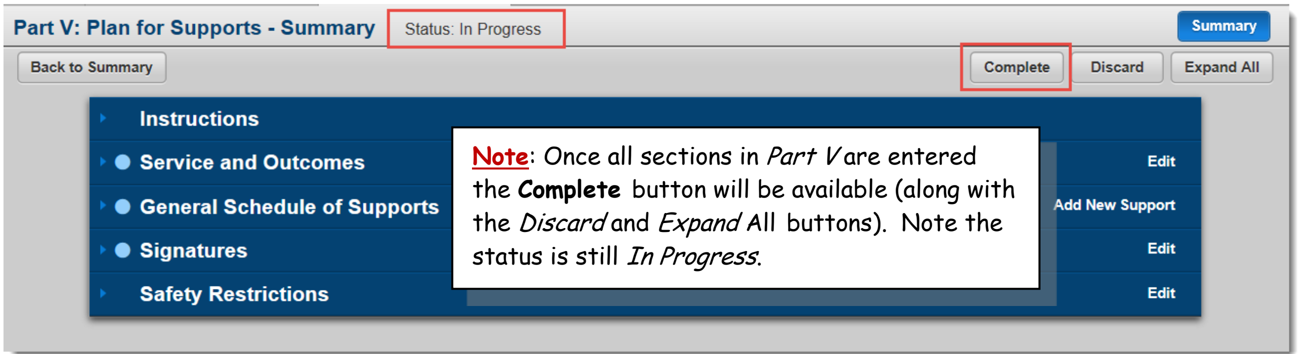
f. Click on **Save**. *The contributor information is added to the Part V signature and the ISP Main page reappears.*



> Note: Be sure to **Save** signatures BEFORE going back to the *Summary* page after clicking on the *Add New* button when adding signatures.

4.5 Complete Part V – Modified Use

Once all of the sections in *Part V* have been entered and finalized (*filled in blue circles*) the provider can *Complete Part V*.



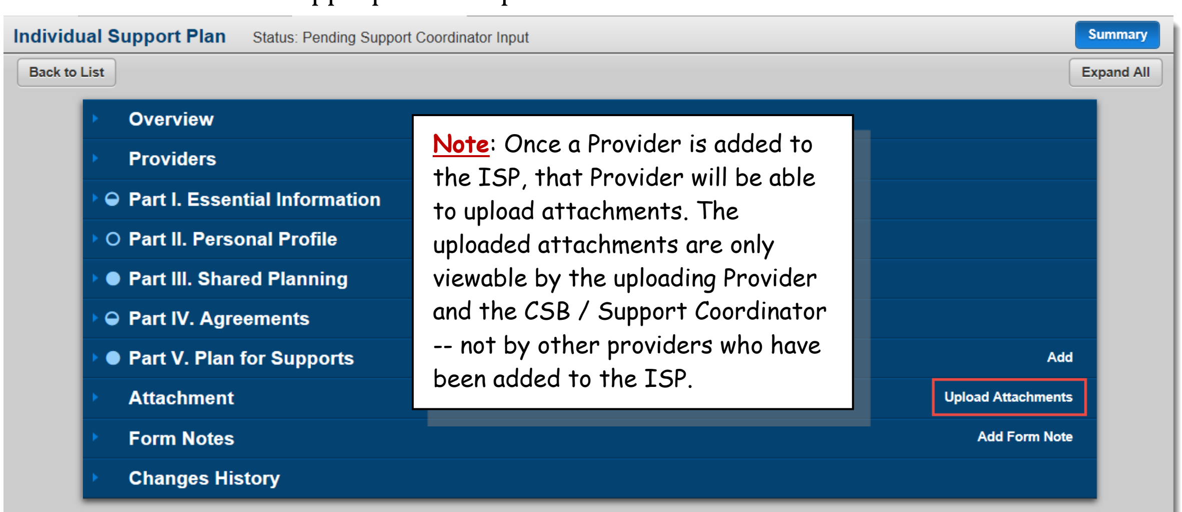
Follow the instructions in Section 4.3.5 above to complete Part V of the ISP.

4.6 Upload Attachments to ISP

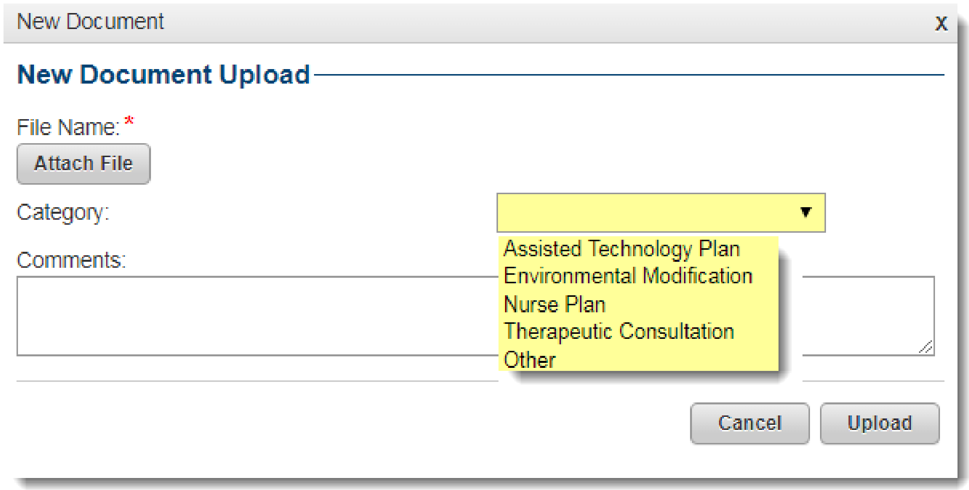
Attachments for the following plan documents should be uploaded to the ISP: *Assisted Technology Plan, Environmental Modification, Nurse Plan,* and *Therapeutic Consultation.*

Note: A provider will be able to upload an attachment to the ISP area when: 1) an ISP has been created; and 2) the provider has been added to the ISP. Avoid, when possible, adding any ISP attachments to the"Person's Information" section.

1. If necessary, locate the individual using one of the steps in the above section 3.1 (Alerts tab); or section 3.2.1 (My List/Individual Support Plan).
2. Click on **GO** or **View** as appropriate to open the individual's ISP record.

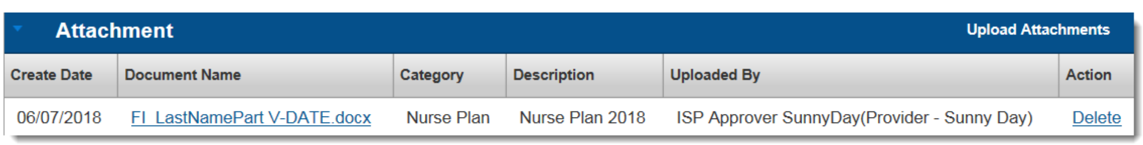


3. Click on **Upload Attachments** from the ISP *Attachment* section. *The New Document Upload dialog box appears.*



4. Click **Attach File** and browse to locate the attachment to upload.
5. Select the file to upload and click **Open**. *The file is attached and the file name appears above the Attach File button*.
6. Click the **Category** down arrow to select the appropriate category for the attachment.
7. Type a *description* for the attachment in the **Comments** field.
8. Click on **Upload**. *The file is attached and available in the Attachment section.*
9. Repeat steps 1 through 6 above to add additional attachments.
    - Click the triangle next to *Attachments* to expand the category and click on the Document Name to download added attachment(s).
    - Click the triangle next to *Attachments* to expand the category to delete attachment(s).

Note: Attachments can only be deleted by the person who uploaded it.

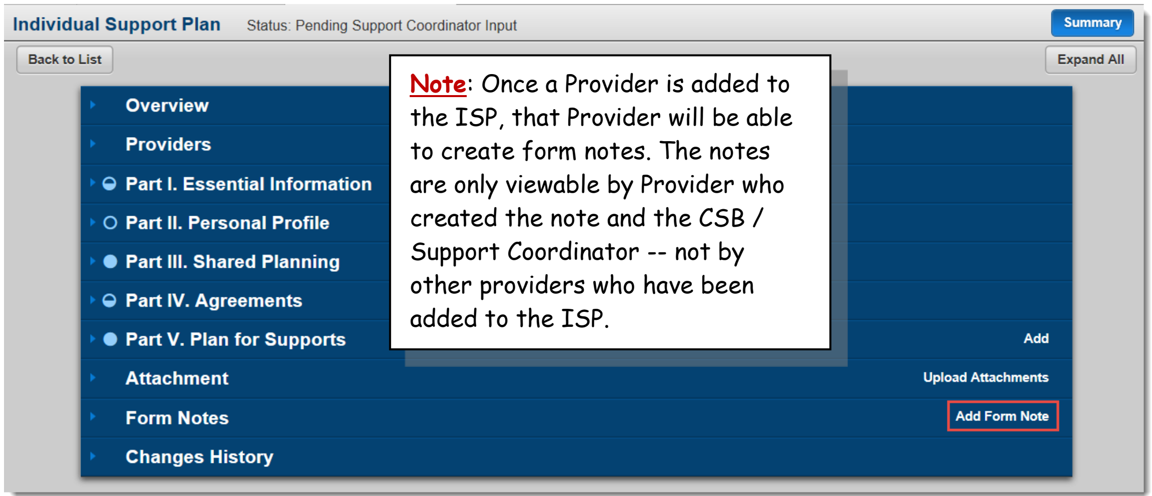


Attachment — Upload Attachments

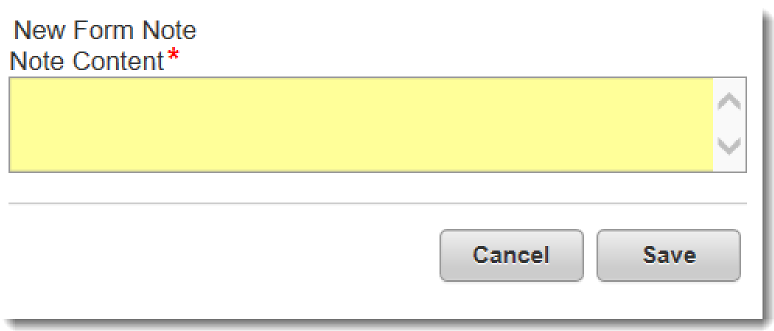
Create Date	Document Name	Category	Description	Uploaded By	Action
06/07/2018	FI_LastNamePart V-DATE.docx	Nurse Plan	Nurse Plan 2018	ISP Approver SunnyDay(Provider - Sunny Day)	Delete

4.7 Add Form Note to ISP

Use *Form Notes* to communicate with the CSB / Support Coordinator about the ISP.



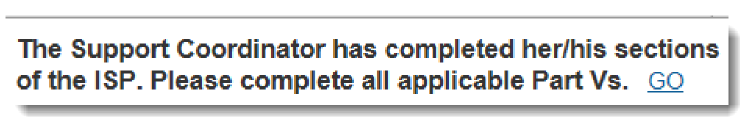
1. Click on **Add Form Note** from the *Form Notes* section. *The Individual Support Plan New Form Note dialog box appears.*



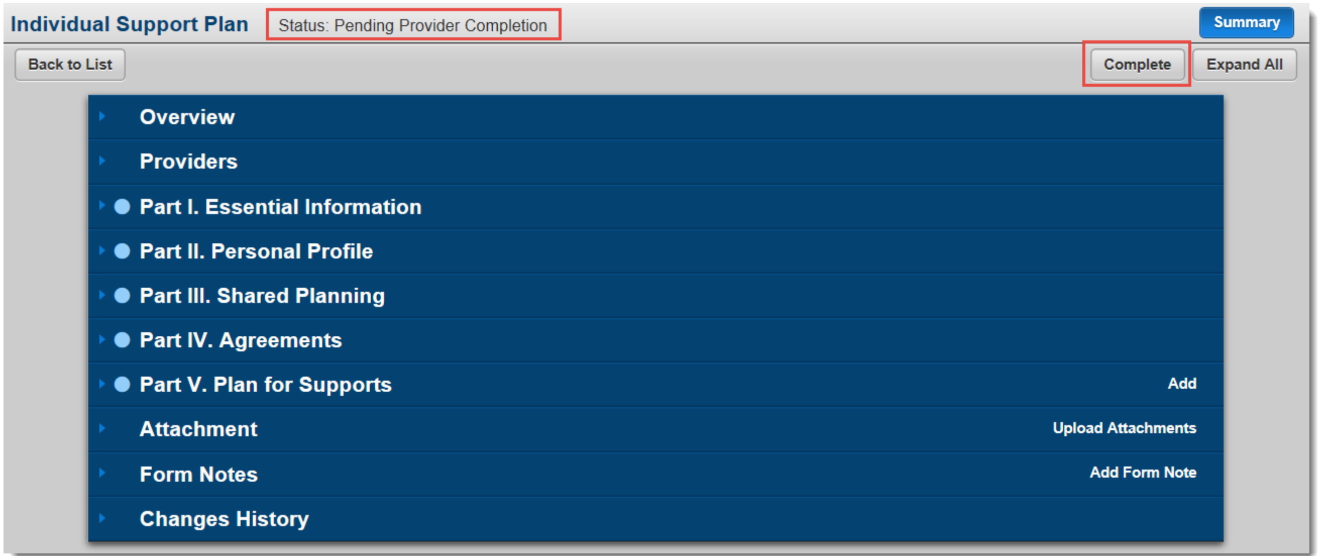
2. Enter the communication in the **Note Content** field.
3. Click on **Save**. *The assigned Support Coordinator / CSB will receive an Alert that there is a note attached to the ISP*.
4. To view notes that have been added, click on the **Form Notes** header to expand.

4.8 Complete ISP

Once the *Support Coordinator* completes *Parts I-IV* of the ISP provider(s) will receive the following **Alert**.

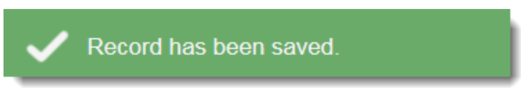


The status of the entire ISP changes to *Pending Provider Completion*. The *Complete* button becomes available for the provider(s).



Once all documents are uploaded, signatures are added to *Parts IV* and all sections of *Part V* (outcomes, schedules, signatures, safety restrictions, if applicable), are complete each provider needs to **Complete** the ISP.

1. Click on **Complete**. *The green Record has been saved popup appears.*



> **Note**: ALL providers must complete the ISP in order for the status to change to *ISP Completed*. If another provider has not completed the ISP, the status will remain *Pending Provider Completion.*

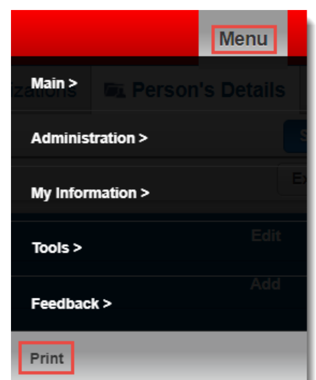
4.9 Print ISP

The entire ISP can be printed and/or saved as a PDF. Additionally, individual sections of the ISP can be printed.

4.9.1 Print Entire ISP

1. If necessary, select **Programs**, **Individual Support Plan** on the *left navigation bar* and click on **Summary** to open the ISP.

2. Click on **Menu**, **Print**.
3. A PDF version of the ISP opens in a new window.
4. **Print** (Control +P or click on the printer icon) or download to *save* the PDF document.
5. Click the **X** to close the window. *You are returned to WaMS.*



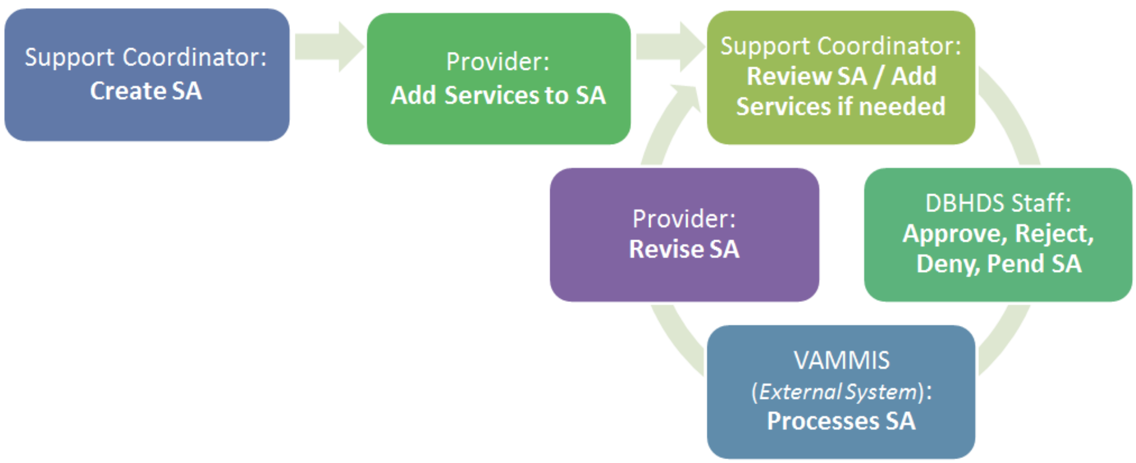
4.9.2 Print Part V – Plan for Supports

1. If necessary, select **Programs**, **Individual Support Plan** on the *left navigation bar* and click on **Summary** to open the ISP.
2. Click on **Part V – Plan for Supports** heading to expand it.
3. Click on **View** to open Part V.
4. Click on **Menu**, **Print**. *A PDF version of Part V (including the General Schedule of Supports calendar) opens in a new window.*
5. **Print** (Control +P or click on the printer icon) or download to *save* the PDF document.
6. Click the **X** to close the window. *You are returned to WaMS.*

5 Service Authorizations

The Support Coordinator begins the Service Authorization (SA) process by creating and adding providers to the SA. Thereafter, the provider can begin adding service lines. In order to add services to the SA, providers must have the *Provider Admin* role in WaMS. All service lines must be reviewed by the Support Coordinator before it can be submitted to the Service Authorization Consultants (a.k.a. PA Staff) at DBHDS for review and approval.

The overall process for requesting a SA is shown in the graphic below.



In order for an SA to be created in WaMS, the following must occur:

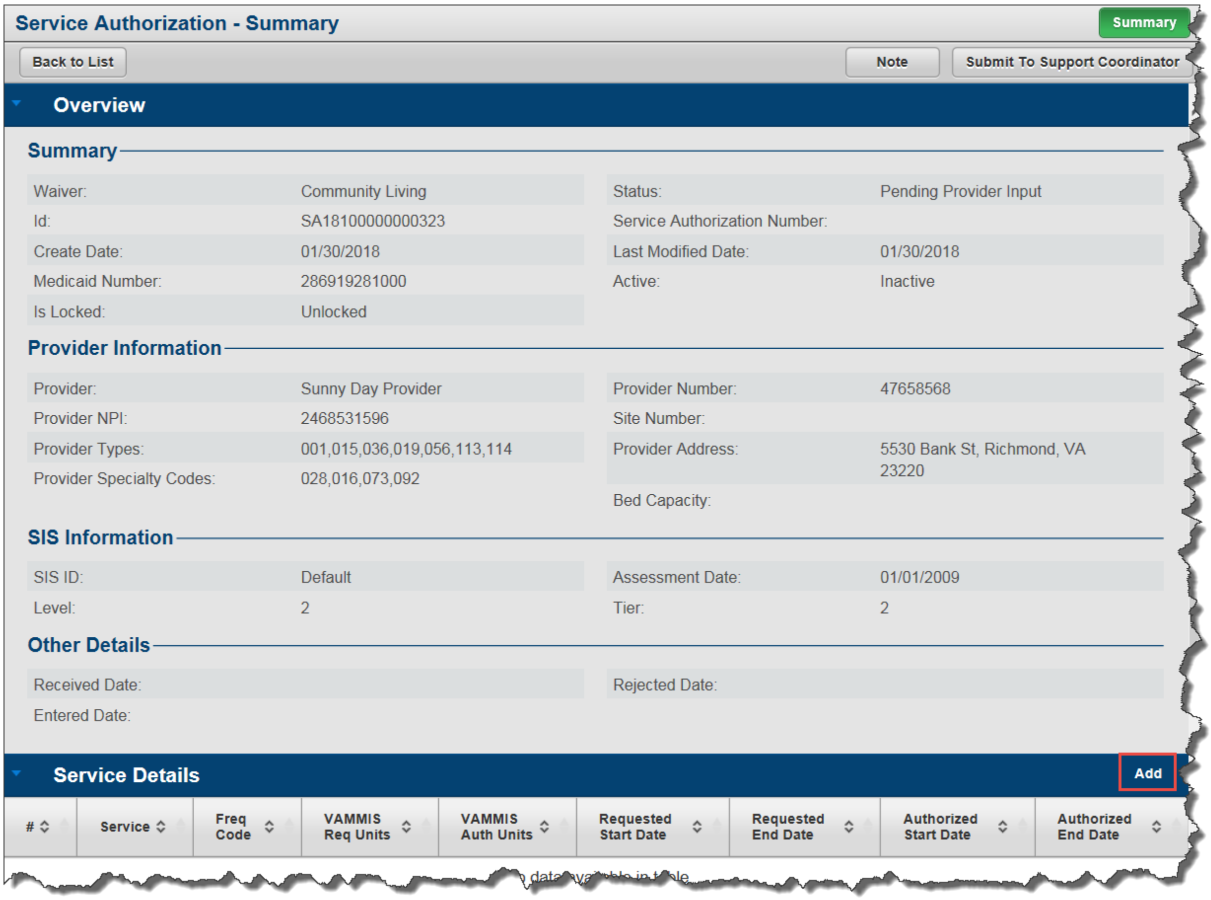
- Profile created
- VIDES submitted
- Individual Added to the Waitlist
- Slot has been assigned by DBHDS
- Individual has an Active Enrollment Status (current or future)

The Support Coordinator will need to create a *new* SA when:

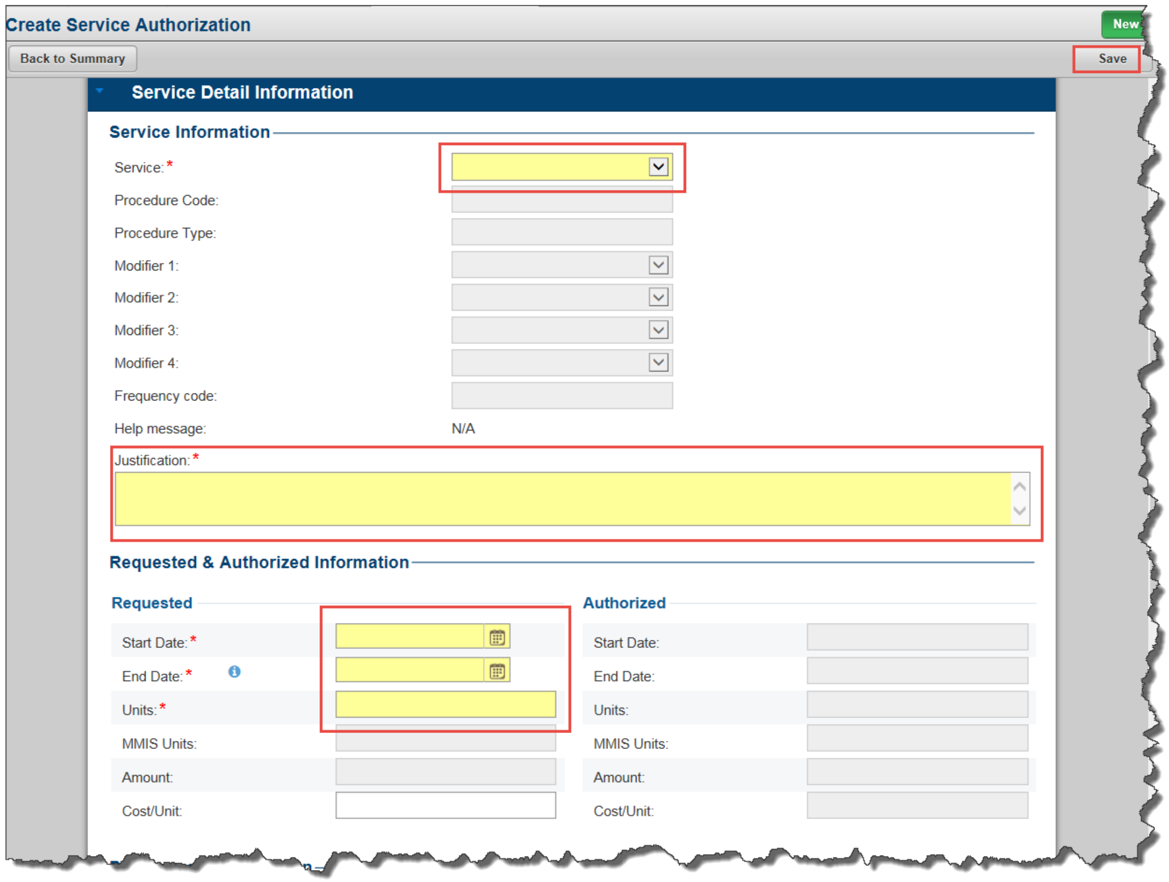
- It is the first SA for the provider for an individual
- All services have ended/expired on all existing SAs for that provider
- A particular service (or group of services) is provided under a different provider number/NPI for the same provider

5.1 Add Service Lines

1. Locate and **GO** to the individual's SA to add services (using one of the options in Section 3 - *Locating and Working with Individual's Record Individuals* above).



2. Under the *Service Authorization – Summary* window, click on **Add**. *The Service Detail information window appears.*



3. Under the *Service Information* and *Requested & Authorized Information* sections add the required information (denoted with red asterisks and yellow highlights):
    a. Select the *Service* drop down to choose the specific service.
    b. Add the reason for the service in the *Justification* field.
    c. Click the *Calendar* icons to add the **Start** and **End Dates** for the service.
    d. Add the number of *Units/Hours* for the service as appropriate.
    e. Click on **Save** to add the service line.
    f. Continue to add services for the individual following steps a. through e. above as necessary.

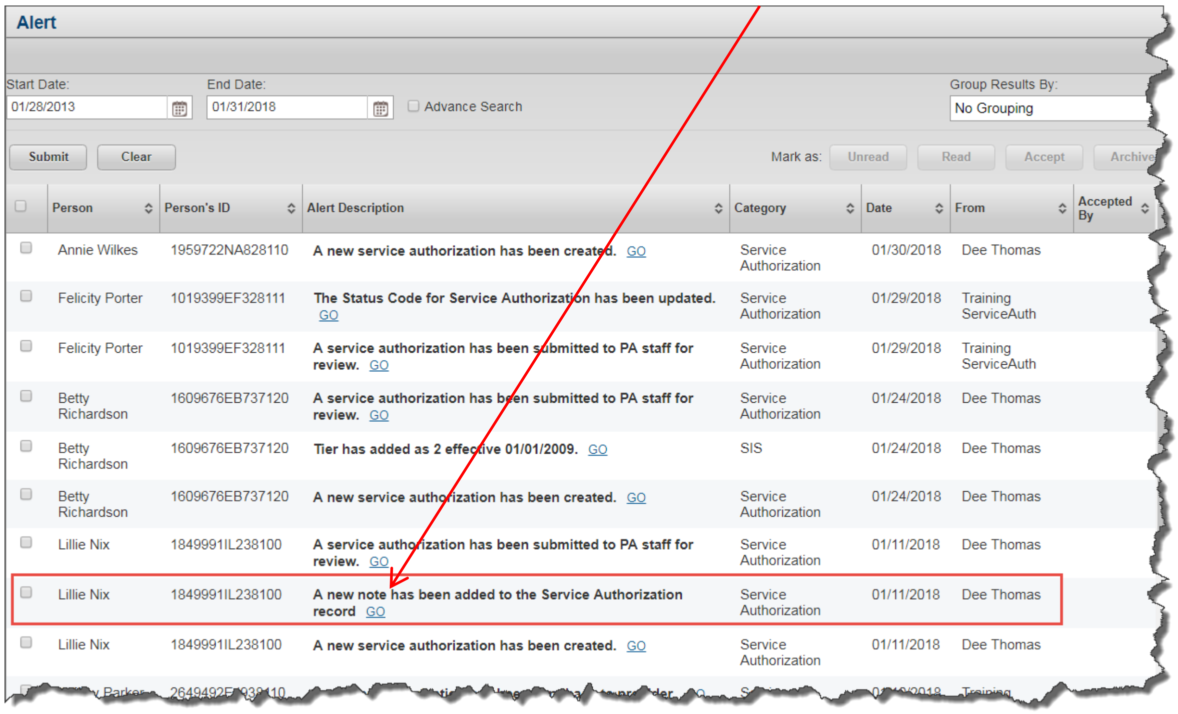
<u>The SA can have a total of 18 service lines</u>. After 18 lines have been added to a single SA, and a new service line is needed, simply click the Add button. The system will automatically create a new SA with a new SA number.

5.2 SA Notes

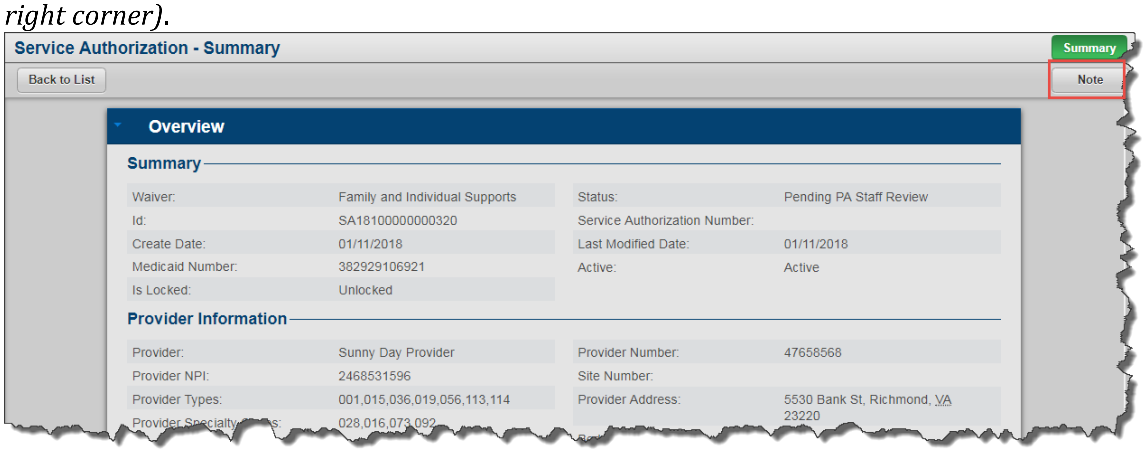
Notes are used to communicate information regarding the SA. For instance, if an SA is "pended", the Service Authorization Consultants will add the reason for the pend in the SA notes area. Providers should add *Notes* to communicate information regarding the SA to the Support Coordinator and DBHDS staff. The notes can be entered or viewed at any time. An *alert* will be sent to the assigned Support Coordinator that a note has been added to the SA.

5.2.1 View and Add Notes to SA

1. From the *Alerts* tab, click on **GO** for an individual where a notification of a new note has been received. *(The individual's record opens to the SA).*



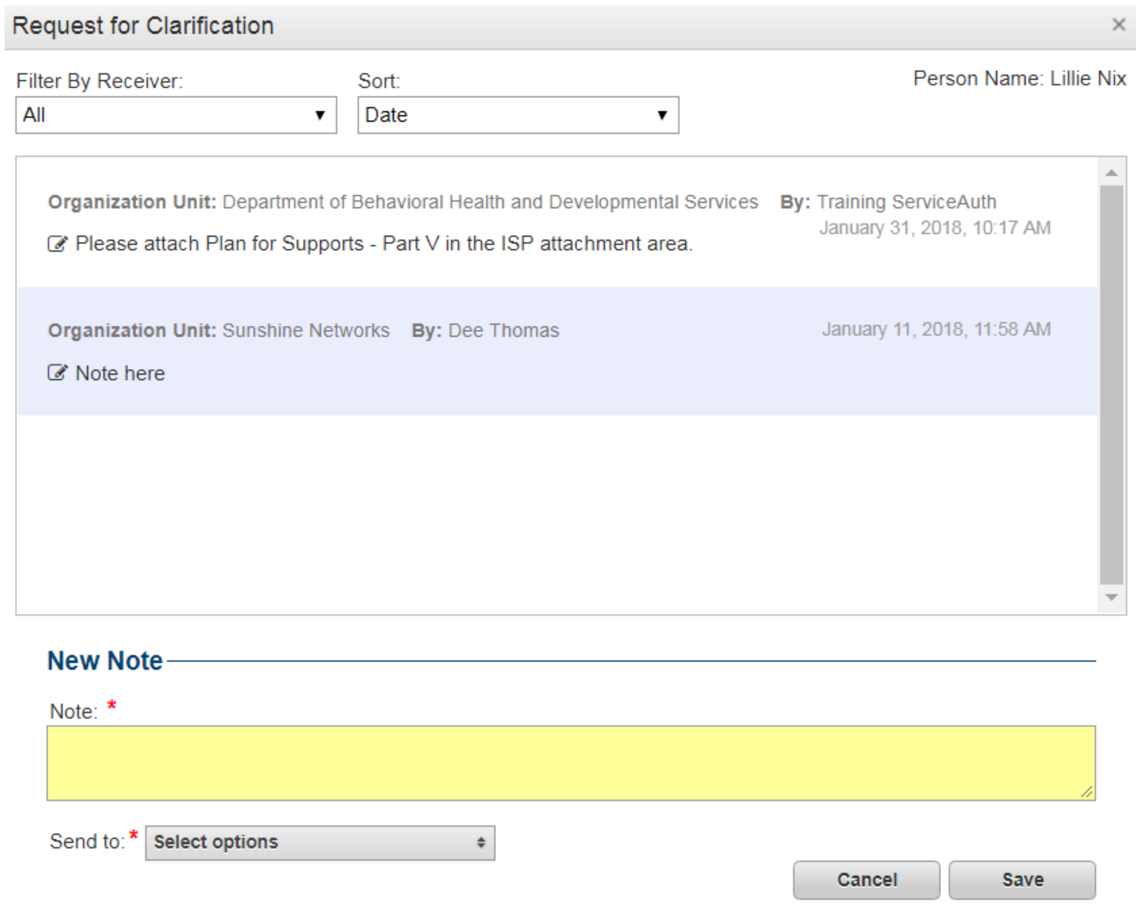
2. From the *Service Authorization – Summary* window, click on the **Note** button *(top right corner)*.



The Request for Clarification note dialog box appears.

- To see only the notes by a group, click the **Filter by Receiver** drop down and select the group (i.e., DBHDS, CSB, Provider).
- Notes can be sorted by **Date**, **Entered by** or **Organization Unit**.

All notes that have been added to the SA appear at the top of *the Request for Clarification* window with the latest note added listed first.



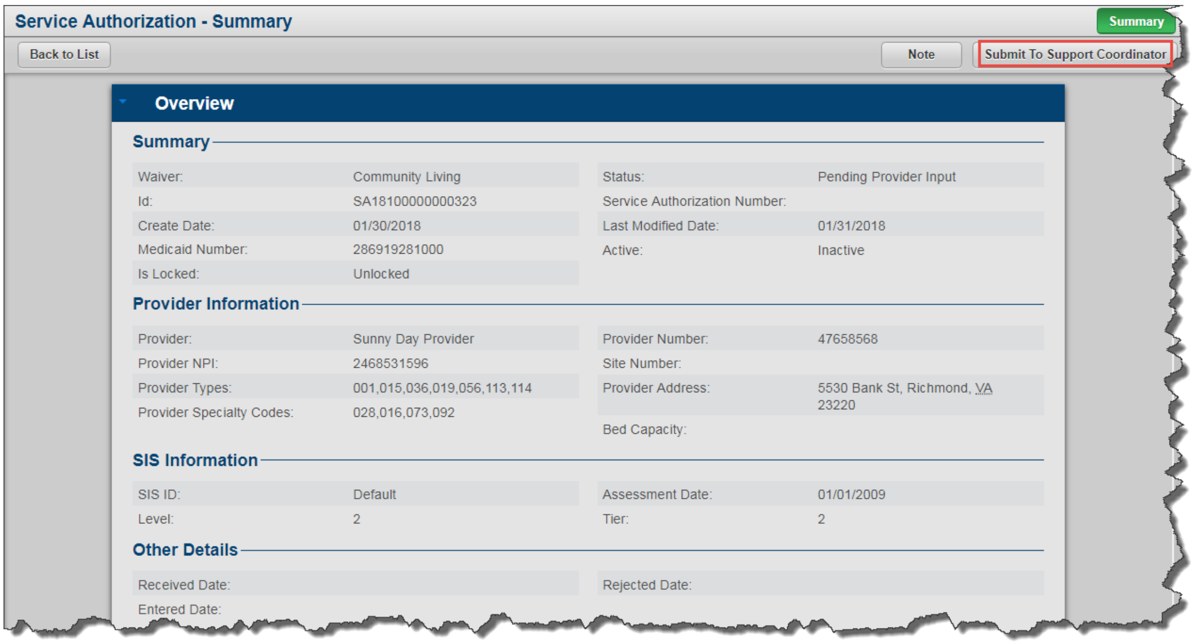
<u>To Add a New Note</u>

1. Click in the yellow **Note** field to add the note.
2. Click the **Send to**: arrows and select the appropriate organization(s) to send the note to (*DBHDS and/or CSB OU*).
3. Click on **Save**. *The Note is added to the Request for Clarification note dialog box.*

5.3 Submit SA to Support Coordinator

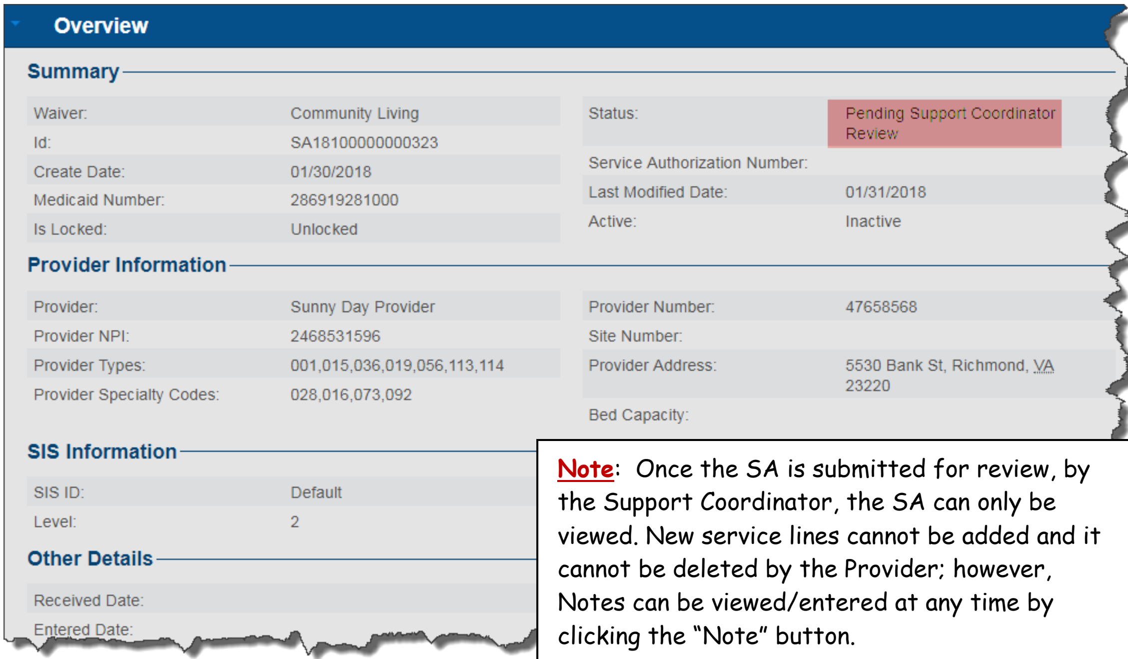
Once all services have been added (using steps in Section 5.1 above), the SA should be sent to the *Support Coordinator* for review.

1. From the *Service Authorization – Summary* window, click on **Submit to Support Coordinator**.



The "Are you sure you want to submit to support coordinator" dialog box appears.

2. Click on **Continue**. *The SA is now in Pending Support Coordinator Review status.*



Overview

Summary

Waiver:	Community Living	Status:	Pending Support Coordinator Review
Id:	SA18100000000323	Service Authorization Number:	
Create Date:	01/30/2018	Last Modified Date:	01/31/2018
Medicaid Number:	286919281000	Active:	Inactive
Is Locked:	Unlocked		

Provider Information

Provider:	Sunny Day Provider	Provider Number:	47658568
Provider NPI:	2468531596	Site Number:	
Provider Types:	001,015,036,019,056,113,114	Provider Address:	5530 Bank St, Richmond, VA 23220
Provider Specialty Codes:	028,016,073,092	Bed Capacity:	

SIS Information

SIS ID:	Default
Level:	2

Other Details

Received Date:	
Entered Date:	

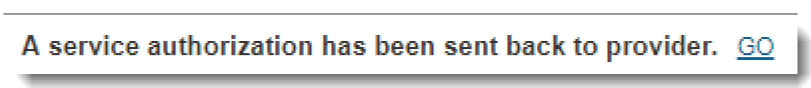
Note: Once the SA is submitted for review, by the Support Coordinator, the SA can only be viewed. New service lines cannot be added and it cannot be deleted by the Provider; however, Notes can be viewed/entered at any time by clicking the "Note" button.

5.4 Edit SA

When an SA is "pended" by the Service Authorization Consultants, the SA may need to be *edited* before it can be approved and sent to VAMMIS. Additionally the Service Authorization Consultants will add a *Note* to the SA stating the reason for the pend and what edits are needed.

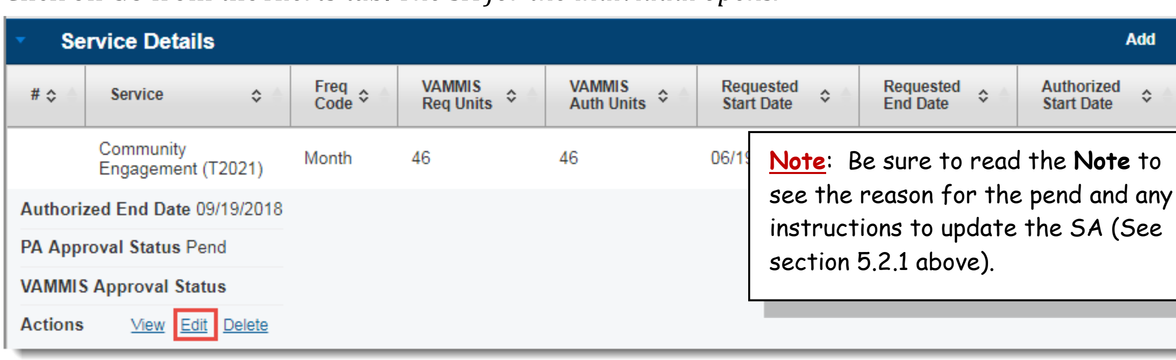
Note: The status of the SA returns to "Pending Provider Input" and can now be edited or deleted.

An alert will be received stating the SA has been pended and sent back.



A service authorization has been sent back to provider. GO

1. Click on **Go** from the *Alerts* tab. *The SA for the individual opens.*



Service Details Add

#	Service	Freq Code	VAMMIS Req Units	VAMMIS Auth Units	Requested Start Date	Requested End Date	Authorized Start Date
	Community Engagement (T2021)	Month	46	46	06/1		

Authorized End Date 09/19/2018

PA Approval Status Pend

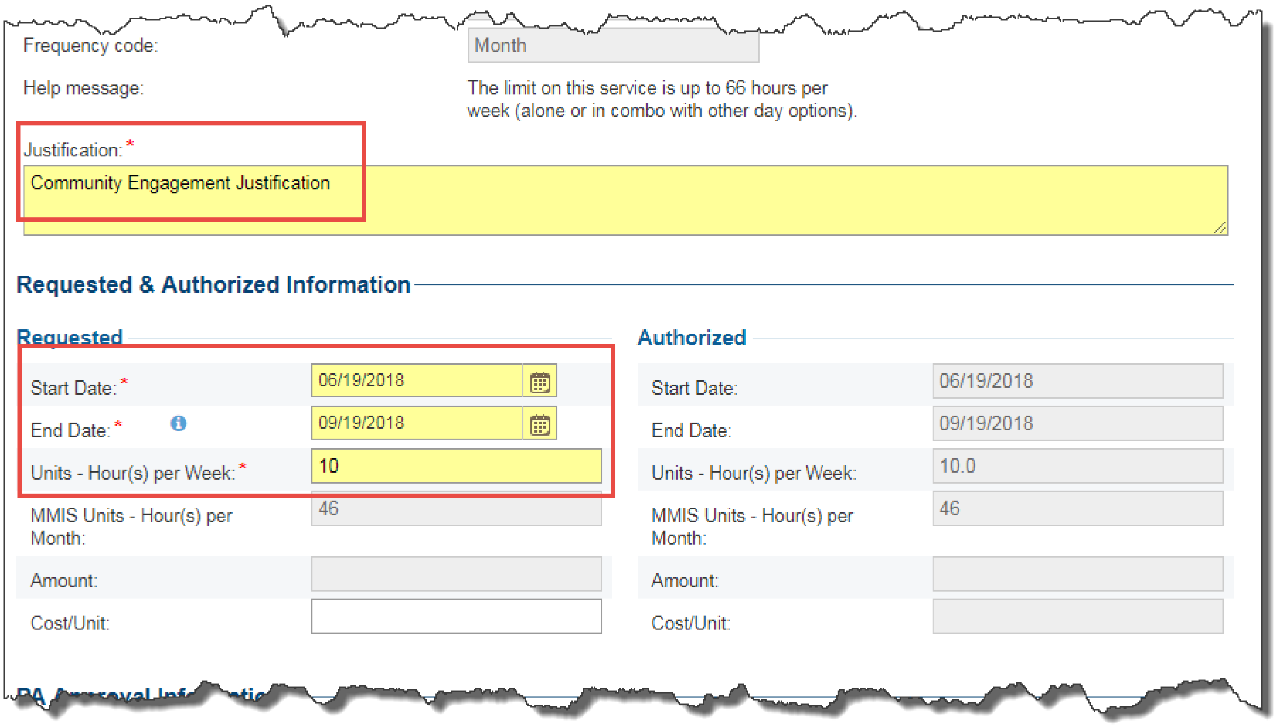
VAMMIS Approval Status

Actions View Edit Delete

Note: Be sure to read the **Note** to see the reason for the pend and any instructions to update the SA (See section 5.2.1 above).

2. Scroll down if necessary to the **Service Details** section.

3. Click on **Edit**.
   Edits can be made to the *Justification*, *Start* and *End Dates* and the *Units*.



4. Make appropriate edits and click on **Save**. *The Service Authorization – Summary page reappears.*
5. Click on **Submit to Support Coordinator**. *The "Are you sure you want to submit to support coordinator" dialog box appears.*

6. Click on **Continue**. *The SA is now in Pending Support Coordinator Review status*.

Once the Support Coordinator reviews the SA, it is sent to the Service Authorization Consultants for review and to be approved, denied, rejected or pended.

5.5 Revise SA

Once the Service Authorization Consultant approves the service, any changes (i.e., increased hours or decreased hours) are considered to be *revisions* from the originally approved service. To account for the revision, the service line that had been approved must be ended. This shows Service Authorization Consultants when the requested revision will become effective and prevents a VAMMIS "overlapping dates of service" error.

The SA can be revised by the Provider or the Support Coordinator when the following conditions have been met:

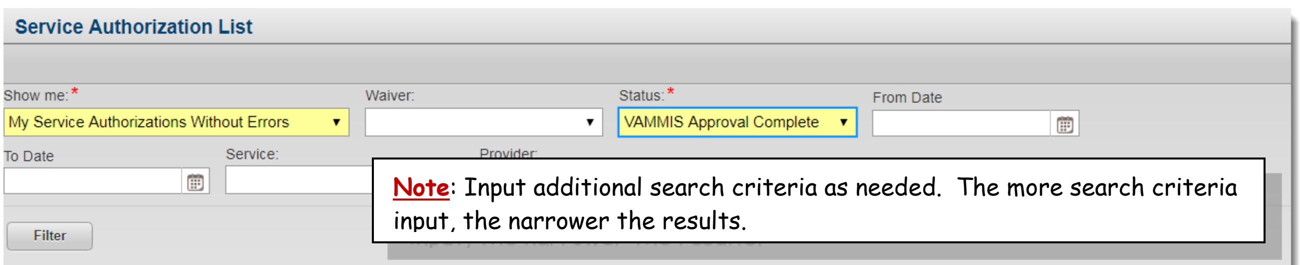
- SA has the status of *VAMMIS Approval Complete*
- SA has at least one active service
- User has the *Provider Admin* user role

5.5.1 Locate the SA to be Revised

5.5.1.1 Using My Lists Tab

1. Click on the **My Lists** tab. *The My Lists window appears (displaying the Individual Support Plan, Recertification and Service Authorization options on the left).*

2. Click on **Service Authorizations**. (on the left menu). *The Service Authorizations List window appears.*



Note: Input additional search criteria as needed. The more search criteria input, the narrower the results.

3. Click the **Status** down arrow to change to *VAMMIS Approval Complete.*
4. Click on **Filter**. *The search results appear..*
5. Click on **View** (under Actions) for the individual's SA that needs to be revised. *The Service Authorization – Summary window appears.*

Note: You may need to scroll to find the appropriate SA.

OR

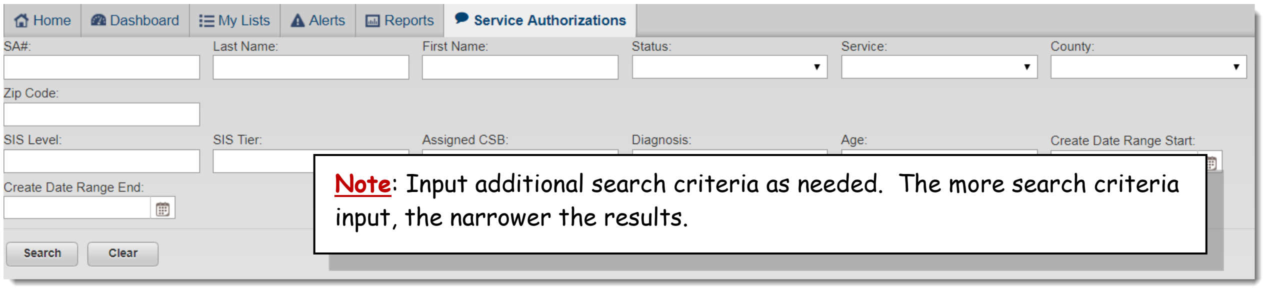
5.5.1.2 Using Service Authorizations Tab

The *Service Authorizations* tab can also be used to locate the SA.

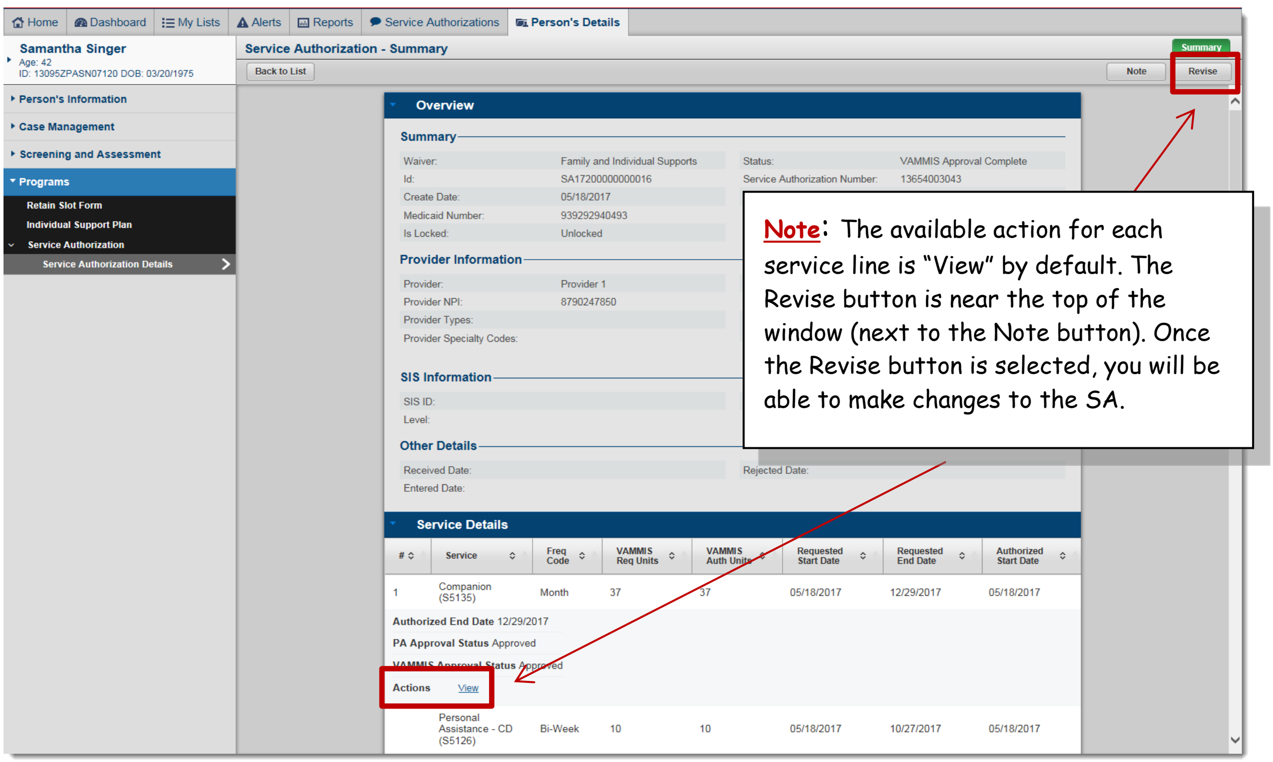
Note: Use the SA tab to locate the SA by searching by an individual's first and/or last name without needing to know the status of the SA.

1. Click on the **Service Authorizations** tab.

The Service Authorizations window appears.



2. Type the **Last Name** or **First Name** for the individual you are looking for in the relevant fields.
3. Click on **Search**. *The search results appear. The results will show all SAs associated with that individual. Select the specific SA li that needs to be revised.*
4. Click on **View** (*under Actions*) for the individual's SA that needs to be revised. *The Service Authorization – Summary window appears.*

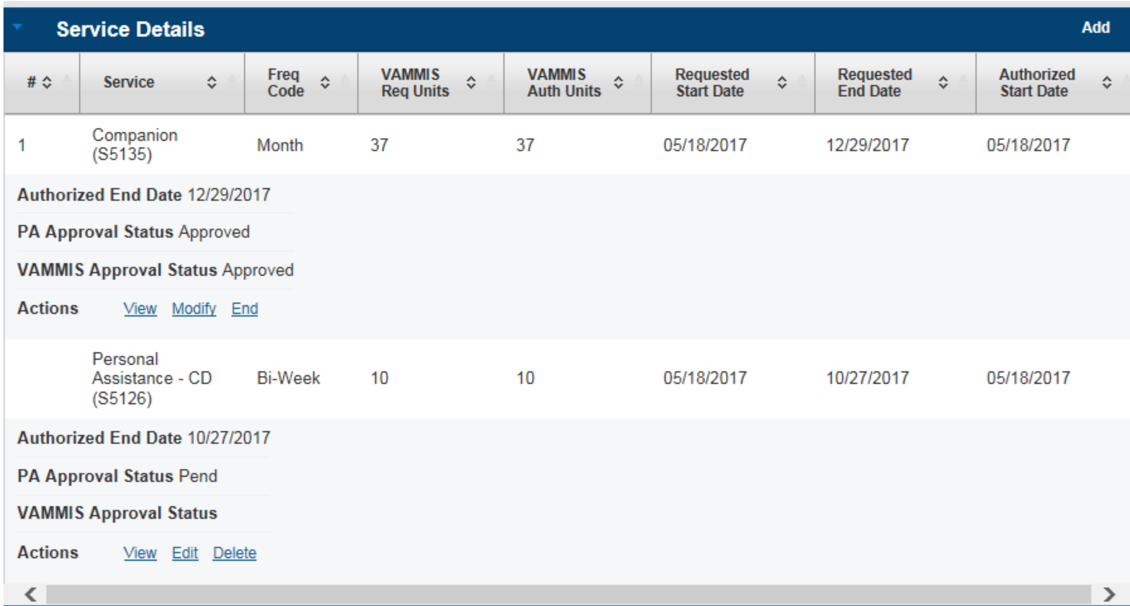


#	Service	Freq Code	VAMMIS Req Units	VAMMIS Auth Units	Requested Start Date	Requested End Date	Authorized Start Date
1	Companion (S5135)	Month	37	37	05/18/2017	12/29/2017	05/18/2017
	Personal Assistance - CD (S5126)	Bi-Week	10	10	05/18/2017	10/27/2017	05/18/2017

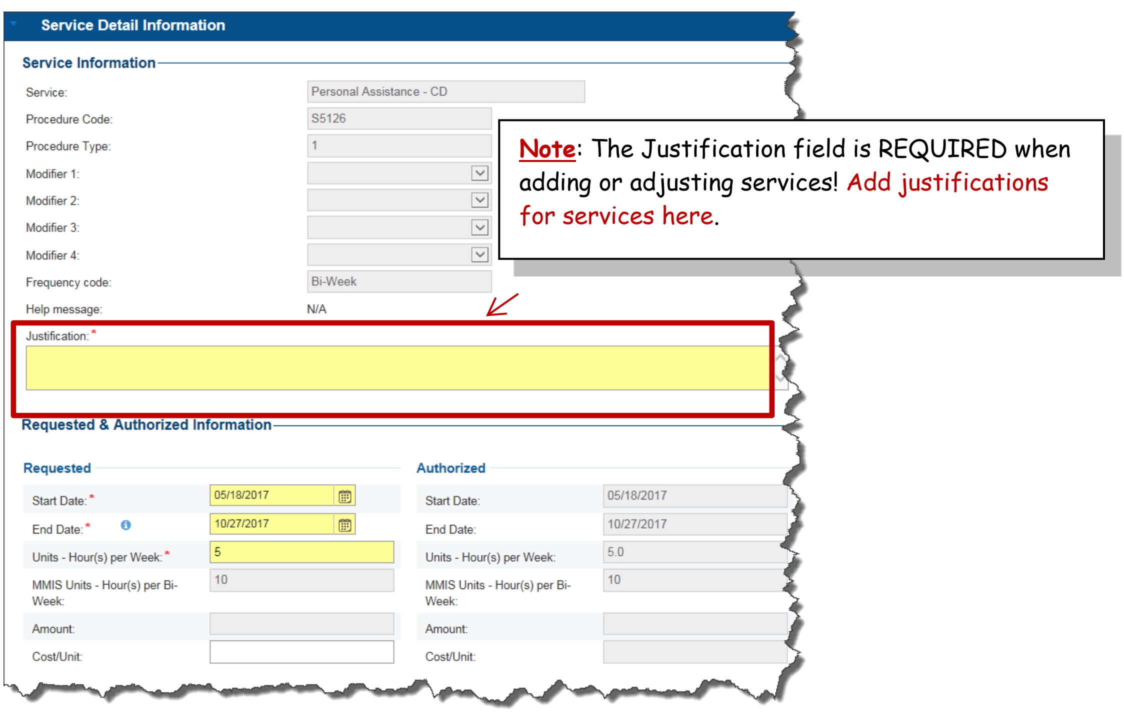
5.5.2 Revise the SA

1. Click on the **Revise** button. *The **Are you sure you want to revise?** prompt appears.*

2. Click on **Continue**. *The SA status changes to **Pending Provider Input** and can now be revised.*



- If the SA has been approved the *Modify* and *End* options are available for the service.
- If the SA has been pended, the *Edit* and *Delete* option are available for the service.
- If a New service is needed, the *Add* option is available.



The revised SA should be re-submitted to the Support Coordinator for review and then to the PA Staff for approval.

5.6 End Service Line

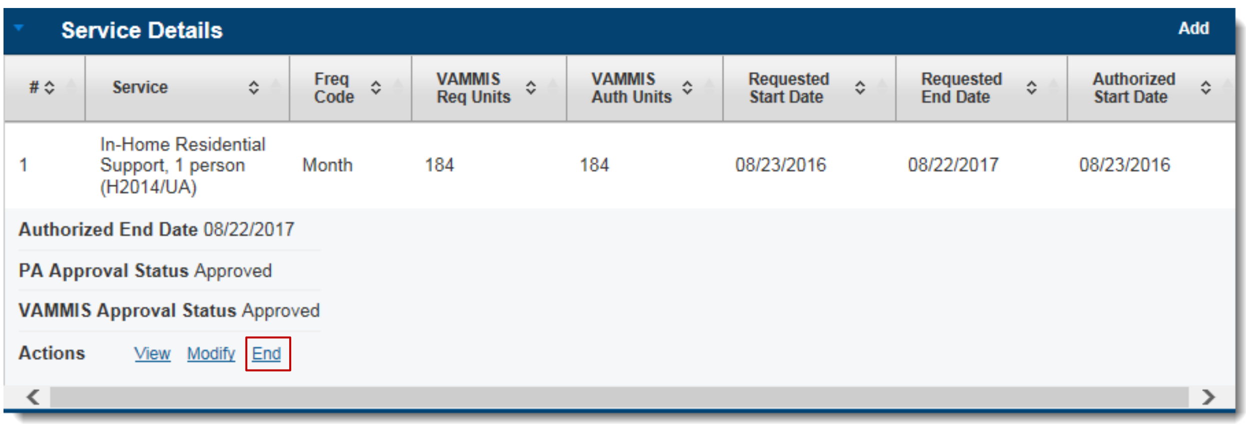
If an individual wishes to add a new service or change the service provider mid-plan year, the "already approved" service lines will need to be ended. For example: If an individual receiving CD personal assistance services moves into a group home, the previous CD services will need to be terminated by the historical service facilitator *PRIOR* to SA being approved for the group home services.

Note: Ending the historical service lines is the responsibility of the previous provider!

Failing to end lines can result in a delayed service delivery to an individual.

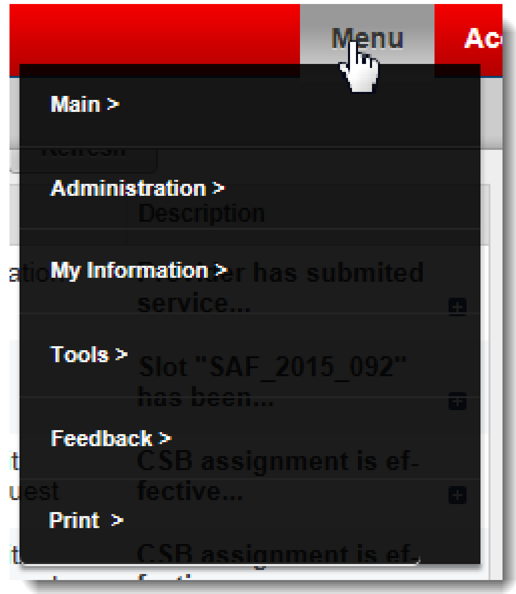
Likewise, if an individual switches providers for the same service, the historical provider will need to end their services before a new provider can receive approval.

See section 5.5.2 for steps to end a service line.



6 WaMS Menu Options

Menu options are available based on the organization and role of the user logged in.



6.1 Main

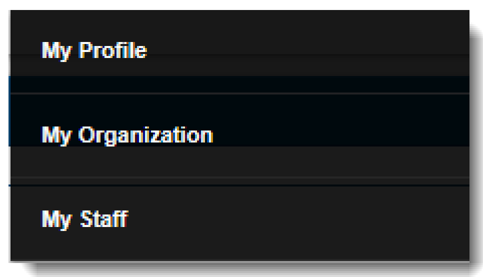
The **Main** submenu provides an alternative way to access the top-level navigation tabs.

To return to the WaMS *Home* page, click on **Main / Home**.

6.2 Administration / User Directory

Search for and obtain email and telephone information for other users of WaMS.

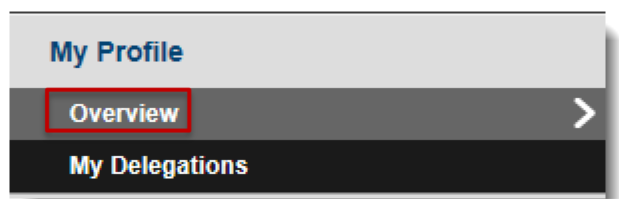
1. Click on **Menu**, **Administration**, **User Directory**. *The User Directory tab opens.*
2. Enter information into the **Organization Unit** and/or **Staff Name** fields.
3. Click on **Search**.



6.3 My Information

The **My Information** submenu includes *My Profile*, *My Organization* and *My Staff* options.

6.3.1 My Profile, Overview

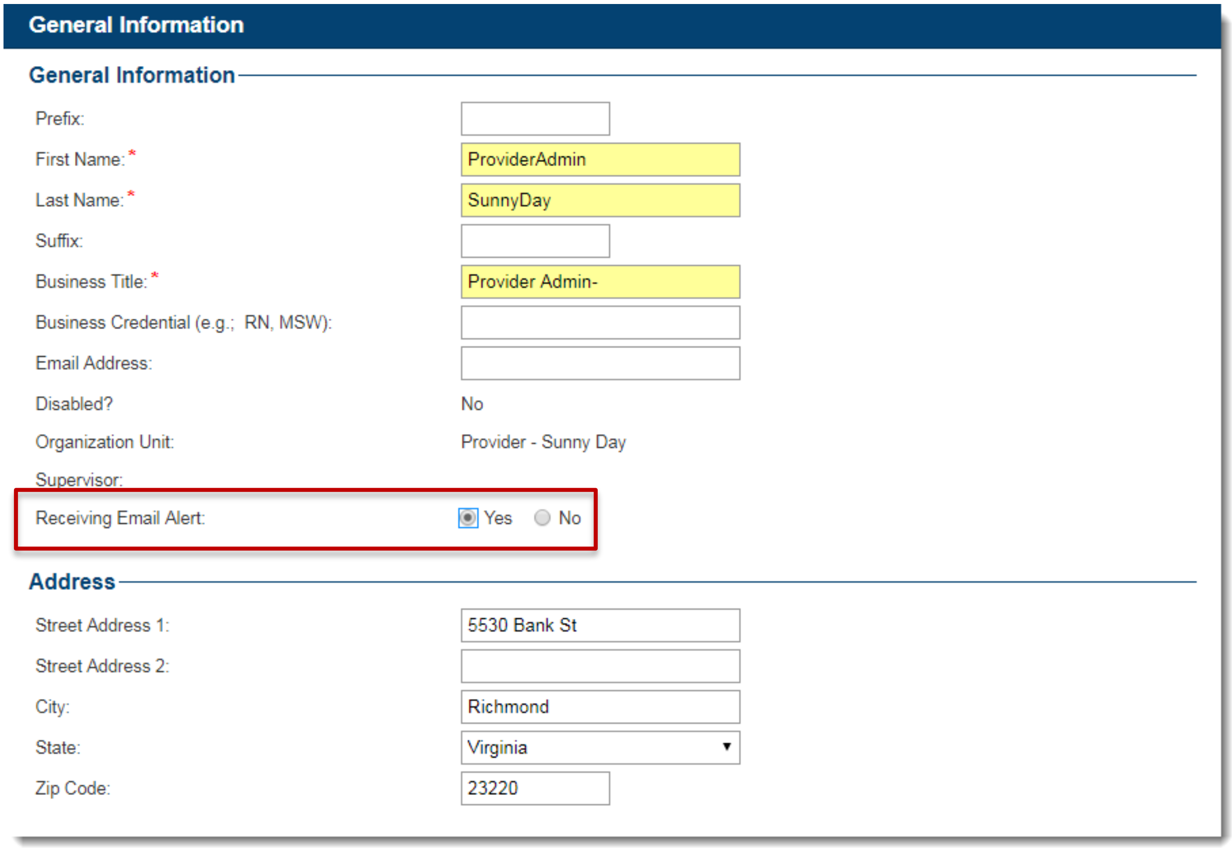


Use the **My Profile, Overview** submenu view and edit certain user and login information such as name, title, email address, phone number and address assigned to the account. This is also where to view the specific *Role (s)* assigned to the user account.

6.3.1.1 Receive Email Alerts

To receive emails when *Alerts* are received in addition to being notified in WaMS, edit the *General Information* under *My Profile*:

1. Click on **Menu**, **My Information, My Profile**. *The My Profile - Overview tab opens.*
2. Click on the *General Information* **Edit** button. *The My Profile — General Information window opens.*



3. Click on the **Yes** radio button for *Receiving Email Alert* to select it.
4. Click on **Save**.

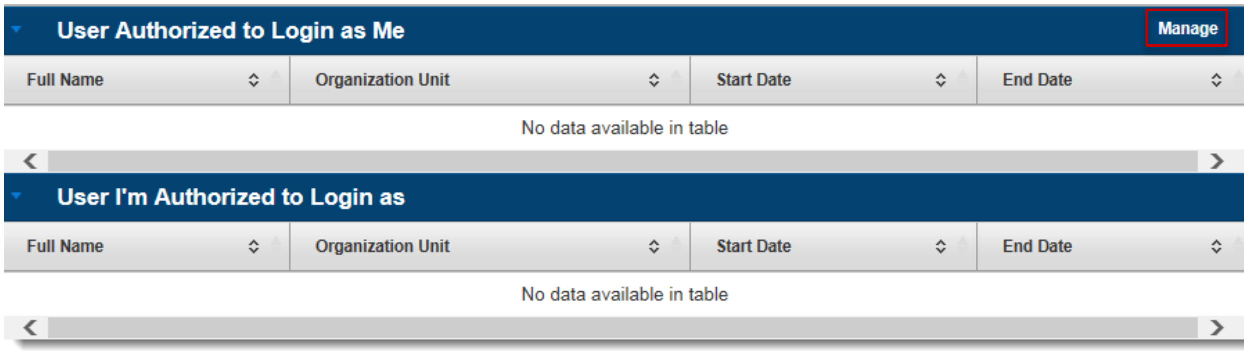
Each time an Alert is received, an email will also be sent to the email address listed in the My Profile section.

6.3.2 My Profile, My Delegations

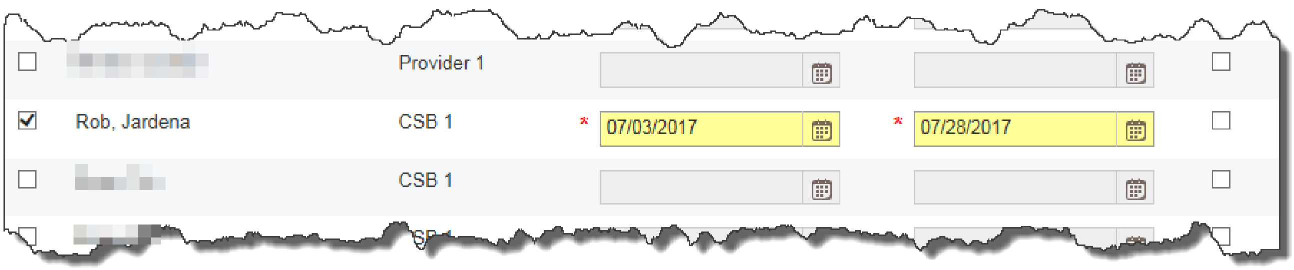
Use **My Profile, My Delegations** to set up delegate access to WaMS. This allows a person you designate to work in WaMS on your behalf. The delegate logs on as the user they are completing the authorization for.

6.3.2.1 Assign Delegate

1. Click on **Menu**, **My Information, My Profile**. *The My Profile - Overview tab opens.*
2. Click on **My Delegations.** *The My Profile — My Delegation window opens.*

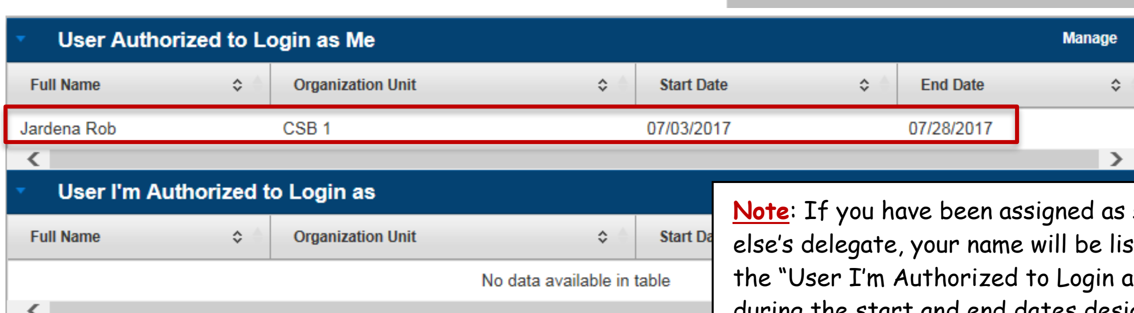


3. Click on **Manage**. *The My Delegation — User(s) Authorized to Login as Me window opens displaying all users in the Organization Unit.*
4. Click the **checkbox** next to each desired user(s) to be set as a delegate. *The start and end date fields become required.*
5. Enter the **Start Date** and **End Date** of the delegation.



6. Click on **Save**. *The delegate(s) name appears in the "User Authorized to Login as Me" section along with the start and end dates.*

Note: The delegate will no longer be able to login as that user after the end date. The End Date should be the day after the last day permission is needed.

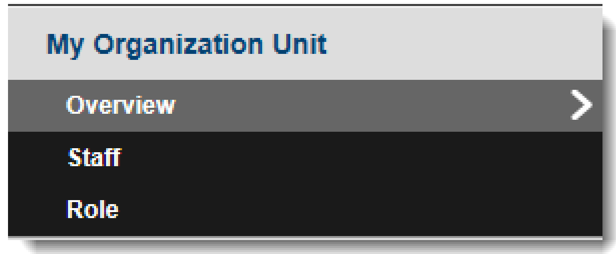


Note: If you have been assigned as someone else's delegate, your name will be listed under the "User I'm Authorized to Login as" section during the start and end dates designated..

6.3.2.2 Remove Delegate (Deactivate)

1. Click on **Manage** in the *My Delegation — User(s) Authorized to Login as Me* window.
2. Locate your delegate's name, then click the **checkbox** next to delegates name to remove the check. *The start date and end date will also be removed.*
3. Click on **Save**. *The delegate(s) name is removed from the "User Authorized to Login as Me" section along with the start and end dates and will no longer be able to login as your delegate.*

6.3.3 My Organization Unit



6.3.3.1 *Overview*

Use to see and edit certain attributes of the organization, including organization name, point of contact, address, Service Areas and Telephone numbers.

6.3.3.2 *Staff*

Use to search for existing staff and create new staff members. (See **Section 7 – Add New Staff Members**) for step-by-step instructions for adding new staff members.

6.3.3.3 *Role*

Use to view roles available to the organization and to see view and edit permissions allowed for a role.

6.3.4 My Staff

Opens the *Staff Search — Overview* window to allow for locating existing staff and creating new staff in the organization. (See **Section 7 – Add New Staff Members**) for step-by-step instructions for adding new staff members

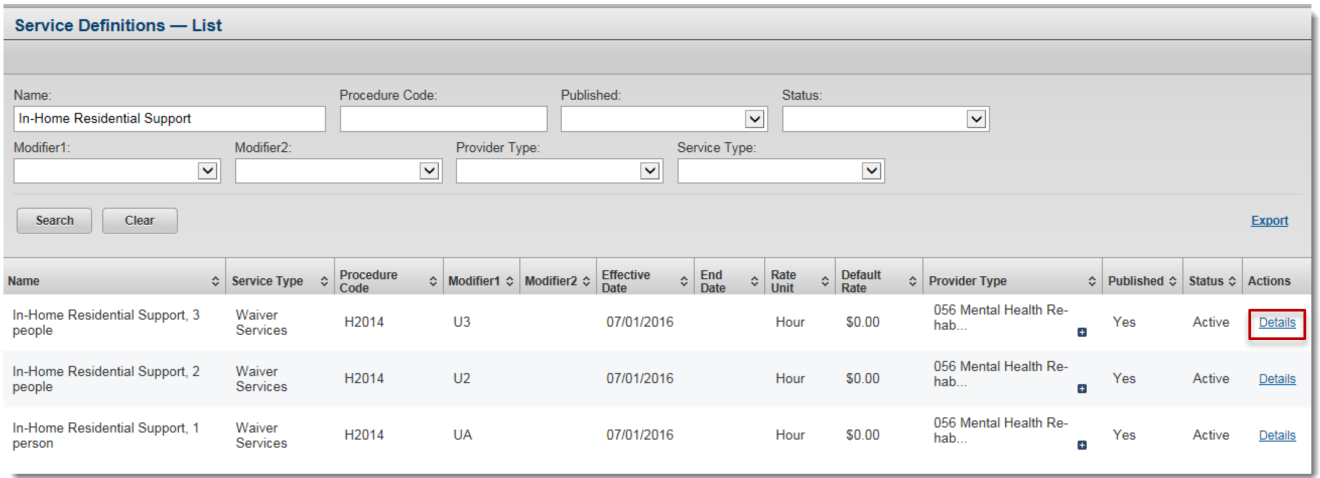
6.4 Tools

Use **Tools** to access **Service Definitions**. Service Definitions describe the parameters of all services.

6.4.1 Service Definitions

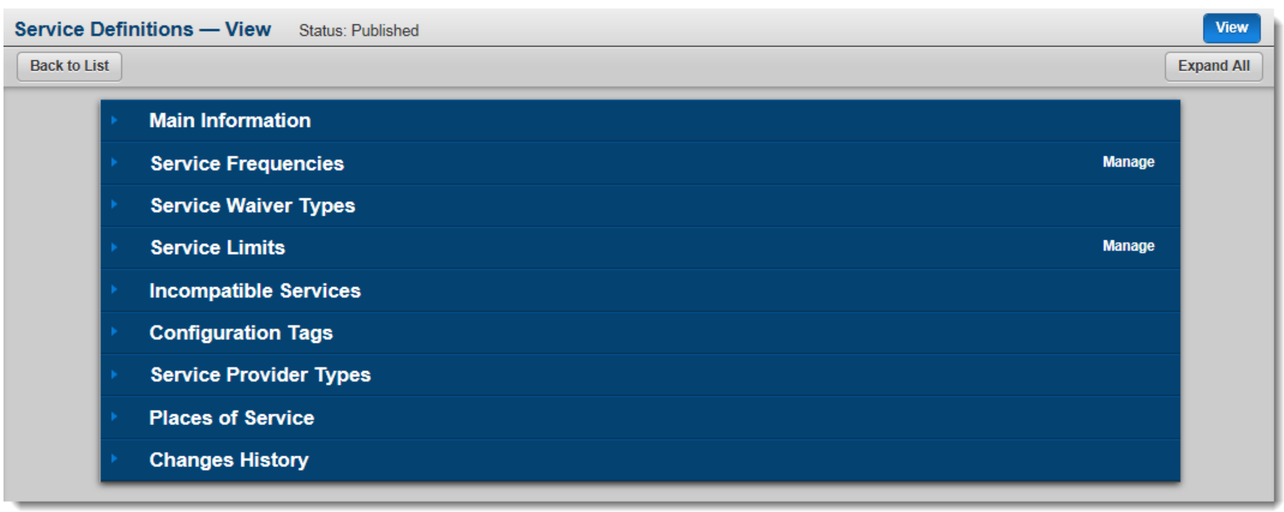
1. Click on **Menu, Tools, Service Definitions.** *The Service Definitions — List window appears.*
2. Type in the search criteria:
    - Name
    - Procedure Code
    - Published
    - Status
    - Modifier 1
    - Modifier 2
    - Provider Type
    - Service Type
3. Click on **Search**.

> Note: Click the **Clear** button to clear search fields and begin a new search.



6.4.1.1 *View Service Definition Details*

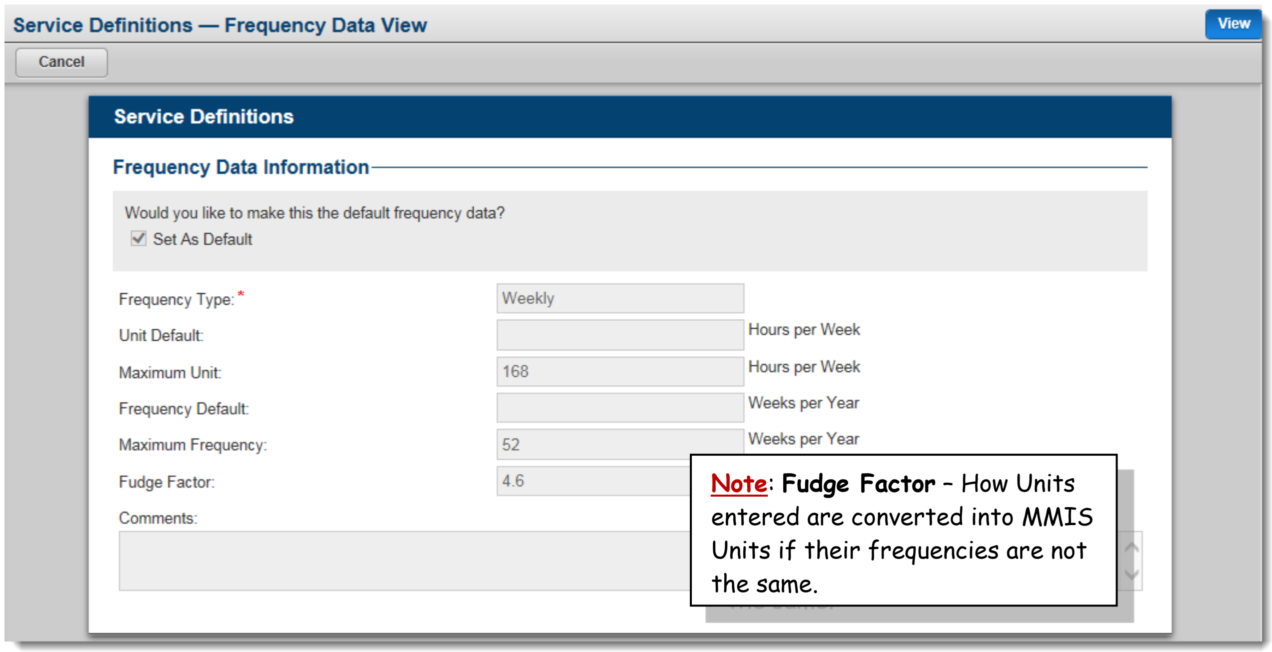
1. Click **Details** under the *Actions* column. *The Service Definition – View window opens.*



2. Click **Manage** for the category name to view additional details.

3. Click **Details** under the *Actions. The Service Definitions — Frequency Data View window opens with additional information.*

Note: The **Next** button is not active. The following message is received when the **Next** button is clicked: "**Error: Access denied. Reason: No permission. You're not authorized to access.**"

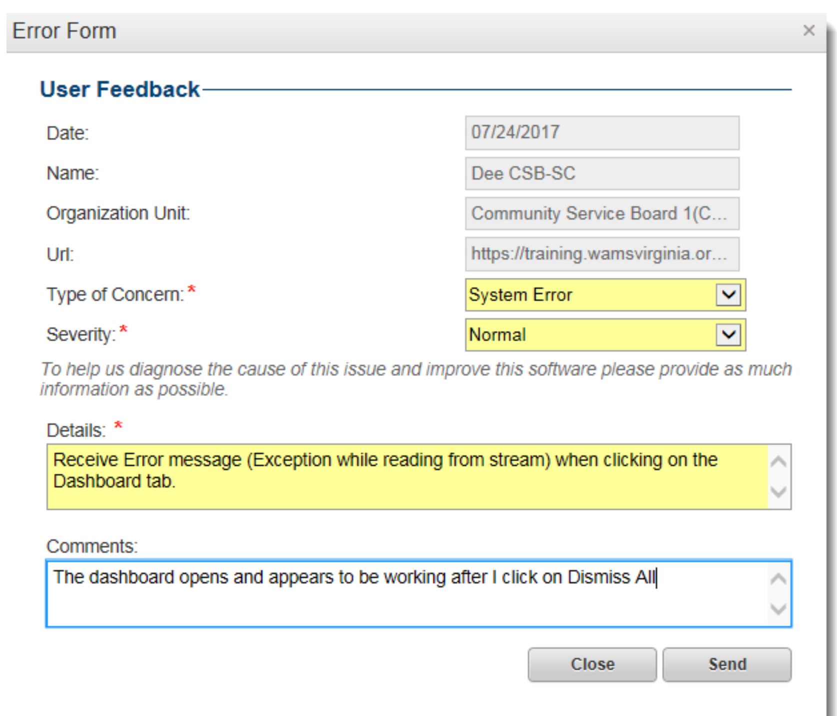


6.5 Feedback

Use the **Feedback** option to send feedback to the WaMS Help Desk. Create new feedback and send to the WaMS Help Desk or view a list previously submitted.

6.5.1 Submit Feedback to WaMS Helpdesk

1. Click on **Menu**, **Feedback**, **Create**. *The Error Form appears.*



2. Complete the required fields:
    - **Type of Concern**: System Error, Question/Comment, Unknown
    - **Severity**: Normal, Urgent
    - **Details**: Free form comments field to address the concern
3. Add additional comments if necessary in the **Comments** field.
4. Click on **Send**.

6.5.2 View List of Previously Submitted Feedback

1. Click on **Menu**, **Feedback**, **List**.

2. Click the **Status** drop down arrow to select submissions that are *Pending*, *In Progress* or *Resolved*.
3. If necessary, select the **Severity** (*Normal* or *Urgent*) and/or **Waiver Type** (*Community Living, Family and Individual Supports or Building Independence*) to narrow the search.
4. Click on **Search**. *The submitted List appears.*

To perform another search, click on ***Clear*** *to remove the search results and repeat steps 2 – 4 above.*

6.5.2.1 Add a Note to the Submitted Feedback Form

1. From the *List* search results (*by performing Steps 1-4 in* ***Section 6.5.2*** *above*), click on **View** under *Actions*. *The Status window opens.*

2. Scroll to the bottom of the *Status* window to display the **Notes** section.

3. Click on **Add**. *The Error Note field appears.*
4. Add additional information for the error in the *Error Note* field.
5. Click on **Save**. Added information appears in the *Notes* field.

Note: Use the Notes field to add notes to the feedback or review notes added by the WaMS Help Desk.

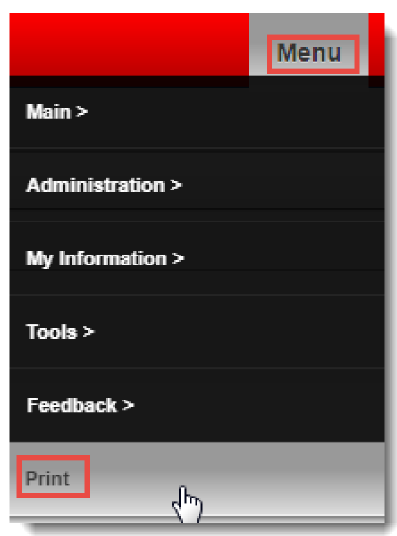
6.5.2.2 Export Submitted Feedback Form

1. Click **Export To CSV** to create an Excel file of the feedback list.

6.6 Print (Print the Screen)

When the **Print** option is selected, a PDF version of any page in WaMS is created for printing or saving (downloading).

1. From any WaMS page, click on **Menu**, **Print**. *A PDF version of the page opens in a new window.*
2. **Print** (*Control +P* or *click on the printer icon*) or **download** to save the PDF document.

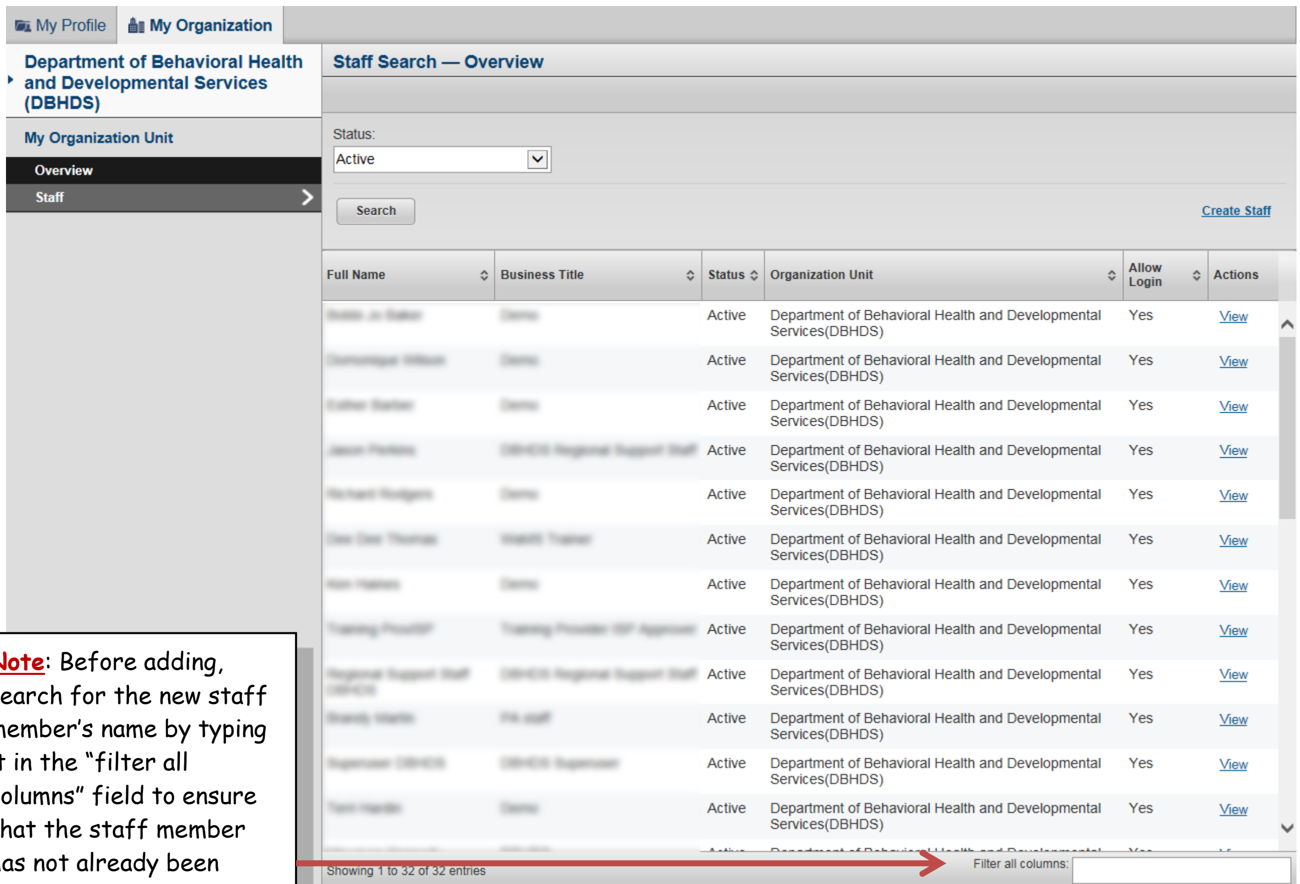


7 Add New Staff Members

A new Staff Member profile should be created for each person who should access to WaMS. 1) Add the New Staff Member to WaMS; and 2) add the member's Role. Once the new member has been added, they will need to confirm and create a password in order to log in to WaMS.

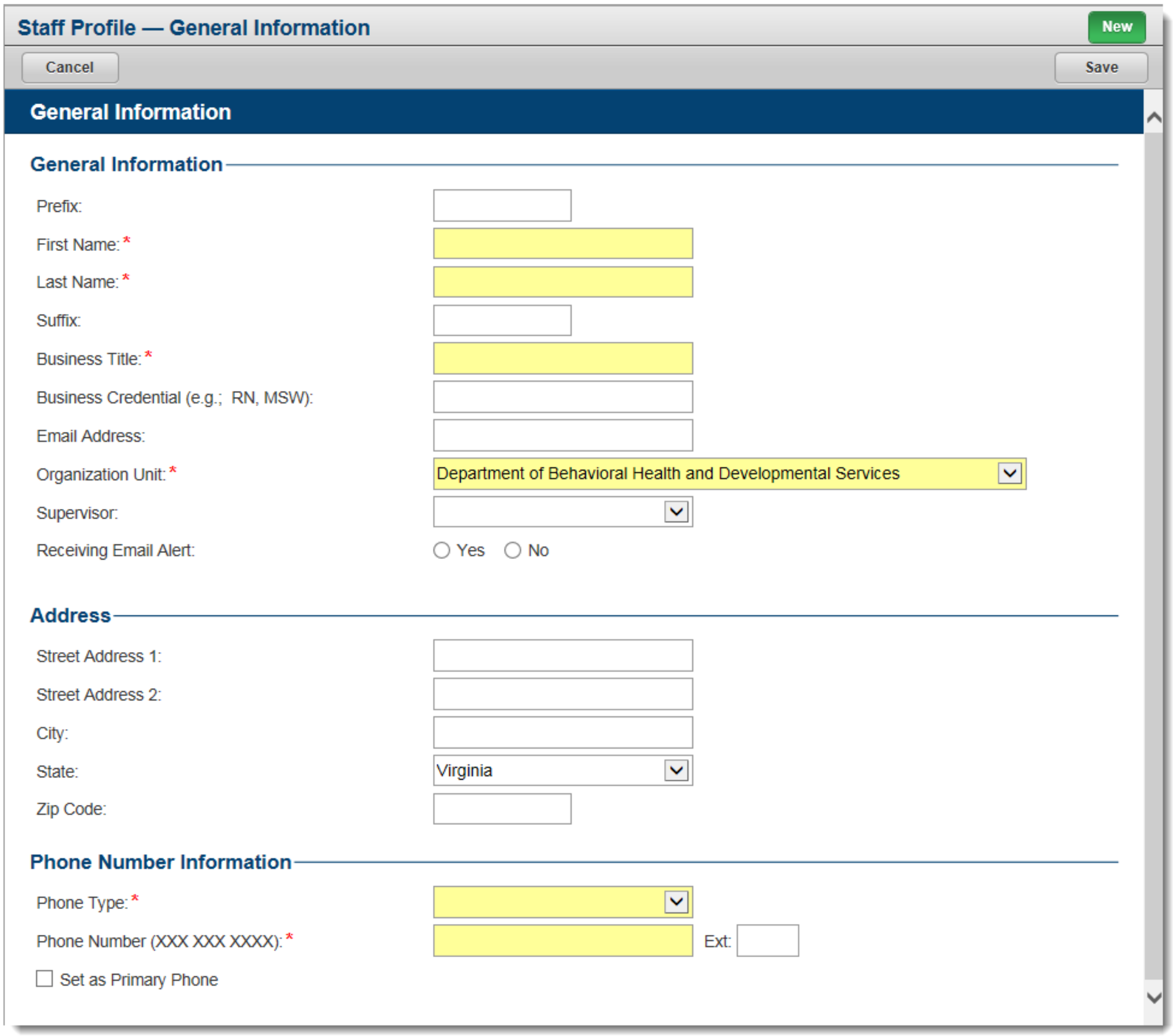
7.1 Complete Staff Profile – General Information

1. Click on **Menu**, **My Information**, **My Staff**. *The Staff Search — Overview window appears on the My Organization tab:*



Note: Before adding, search for the new staff member's name by typing it in the "filter all columns" field to ensure that the staff member has not already been added to the OU.

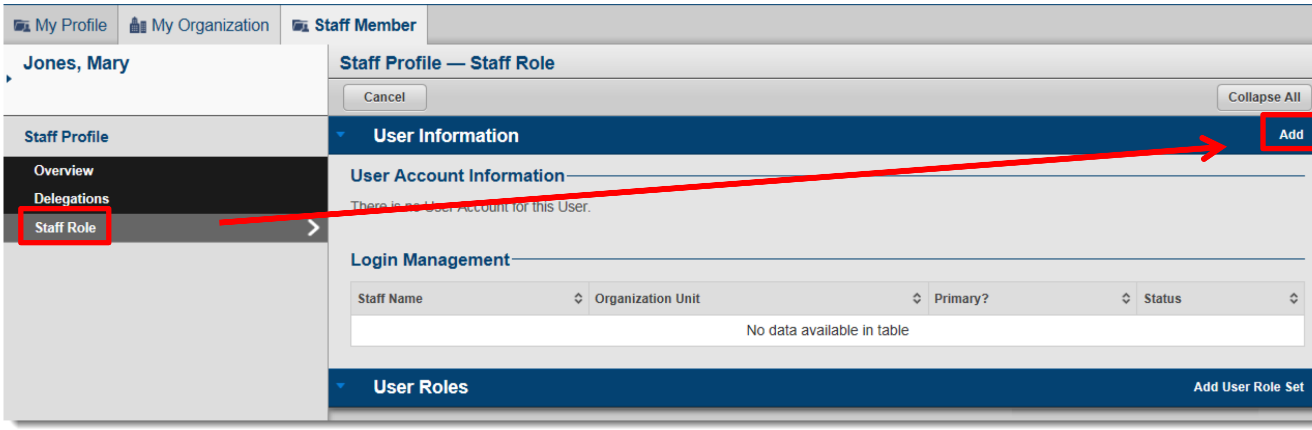
2. Click **Create Staff**. *The Staff Profile — General Information window appears.*
3. Complete the fields for the new staff member's *General Information*.
   a. **Required Fields**: (denoted by yellow field with red asterisk): First Name, Last Name, Business Title, Organization Unit, Phone Type and Phone Number.
   b. **Optional Fields**: Prefix, Suffix, Business Credential (e.g., RN, MSW), Email Address, Supervisor, Address, Phone Ext.



4. Click **Save**. *The New Staff Member has been added to the OU. You will receive a Success: Record has been created message.*

7.1.1 Add User Information

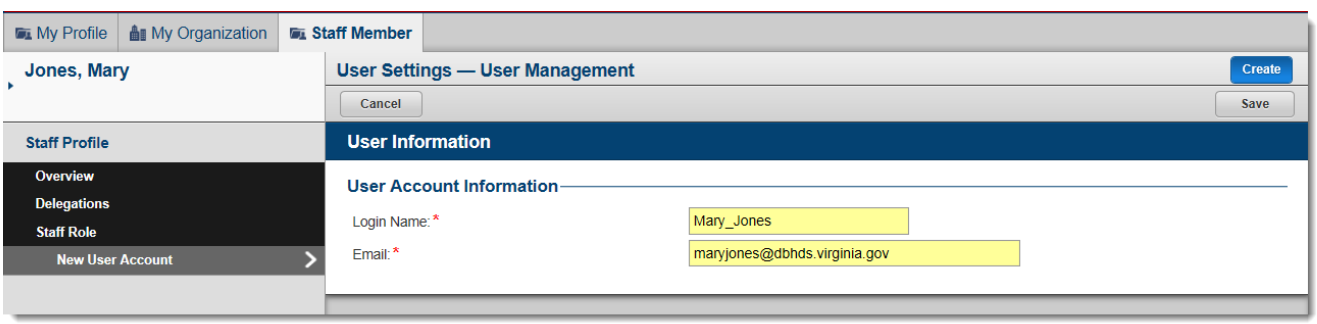
1. From the left navigation, click **Staff Role**. *The Staff Profile — Staff Role window appears.*



2. Click **Add**. *The User Settings — User Management window appears.*
3. Type in login information for the new staff member (login name and email address) in the appropriate fields.

   An email is sent to the new staff member at the email address provided letting them know that their account has been created. The new user must confirm their email address by clicking on ***Confirm Account Creation****. They will then be provided with an opportunity to set their WaMS login password. Once the password has been set, the new user can log into WaMS.*

> Note: The *New User Account* email address must be an accurate work email in order to receive the New Staff Log-on email.
>
> Forwarding the link to a new staff member will not provide WaMS access.

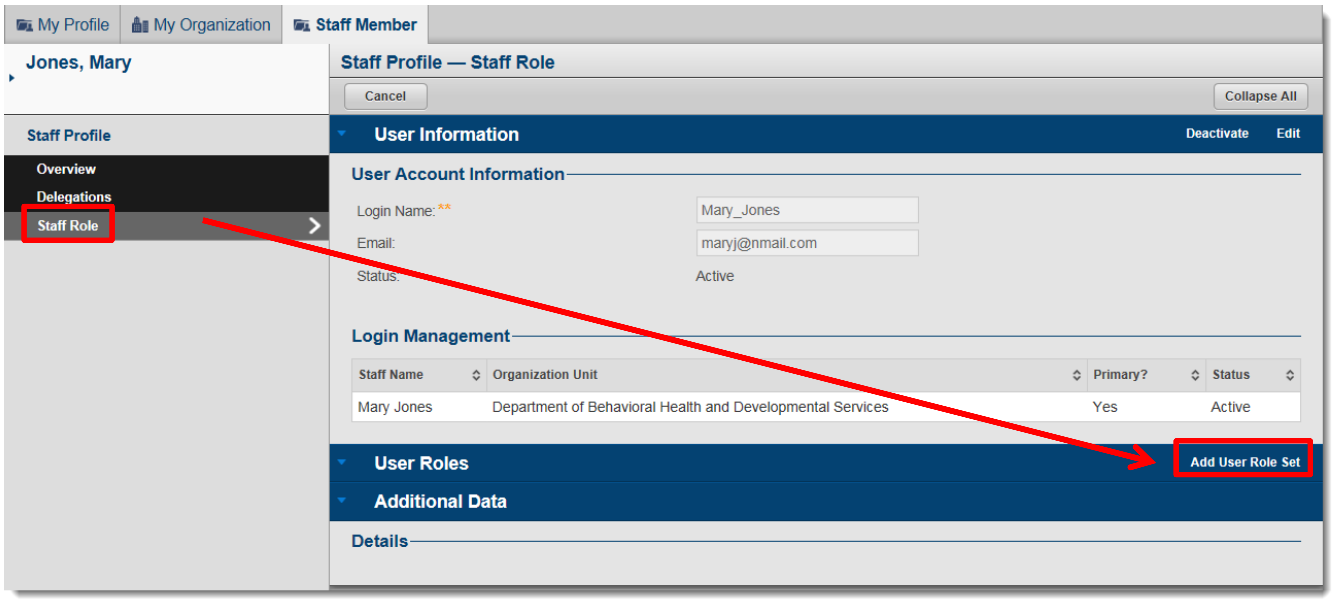


4. Click **Save**.

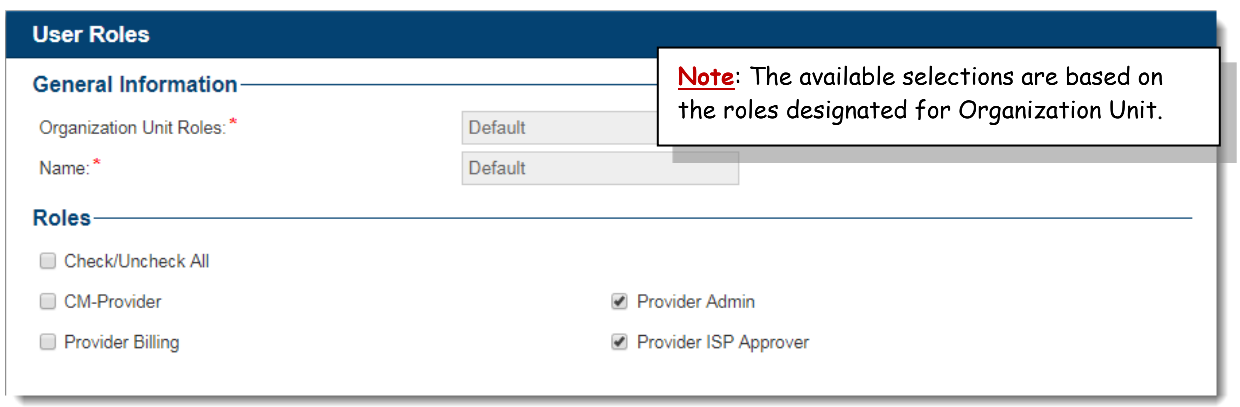
7.2 Add Role for New Staff Member

1. Make sure **Staff Role** is selected from the left navigation.

2. Click **Add User Role Set**. *The User Settings — User Roles window appears.*



3. Select the appropriate role(s) for the new staff member.



4. Click **Save**. *The New Staff Member's role has been added to the OU. You will receive a Success: Record has been created message.*

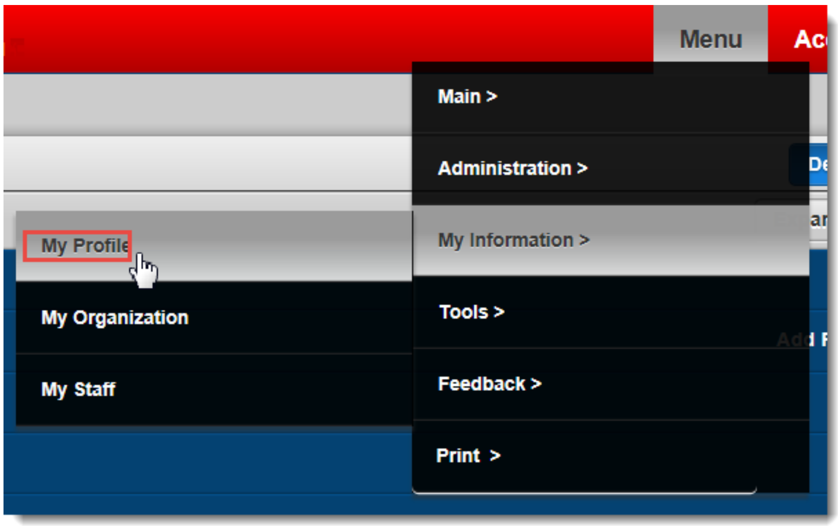
After a new staff member's account has been created, the new user must confirm their email address from their email account by clicking on *Confirm Account Creation*. They will receive an email to set their WaMS login password. After the password has been set, the new staff member will be able to log into WaMS.

Note: WaMS will send two emails: 1) the account has been verified; and 2) the password has been changed.

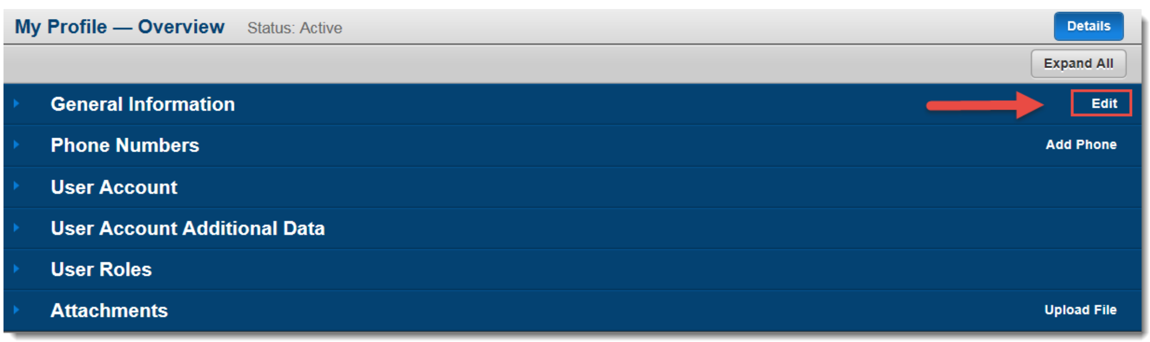
8 Miscellaneous

8.1 Set Email Notification for Alerts

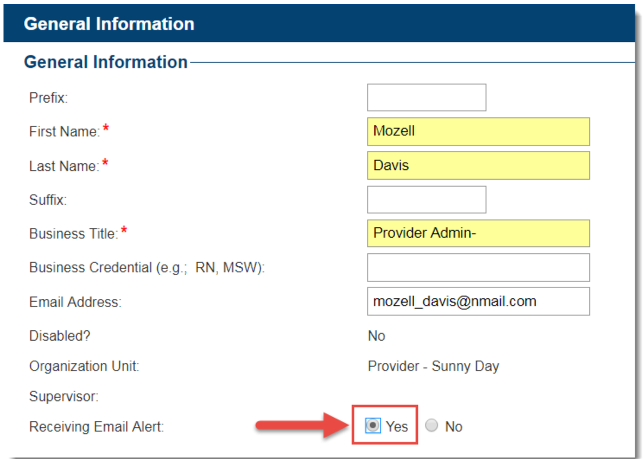
Update your user profile to be notified via email when an alert is sent in WaMS.



1. Click on **Menu**, **My Information**, **My Profile**. *The My Profile — Overview window appears*
2. Click on **Edit** for the *General Information* section.



3. Click on **Yes** radio button for the *Receiving Email Alert* section.

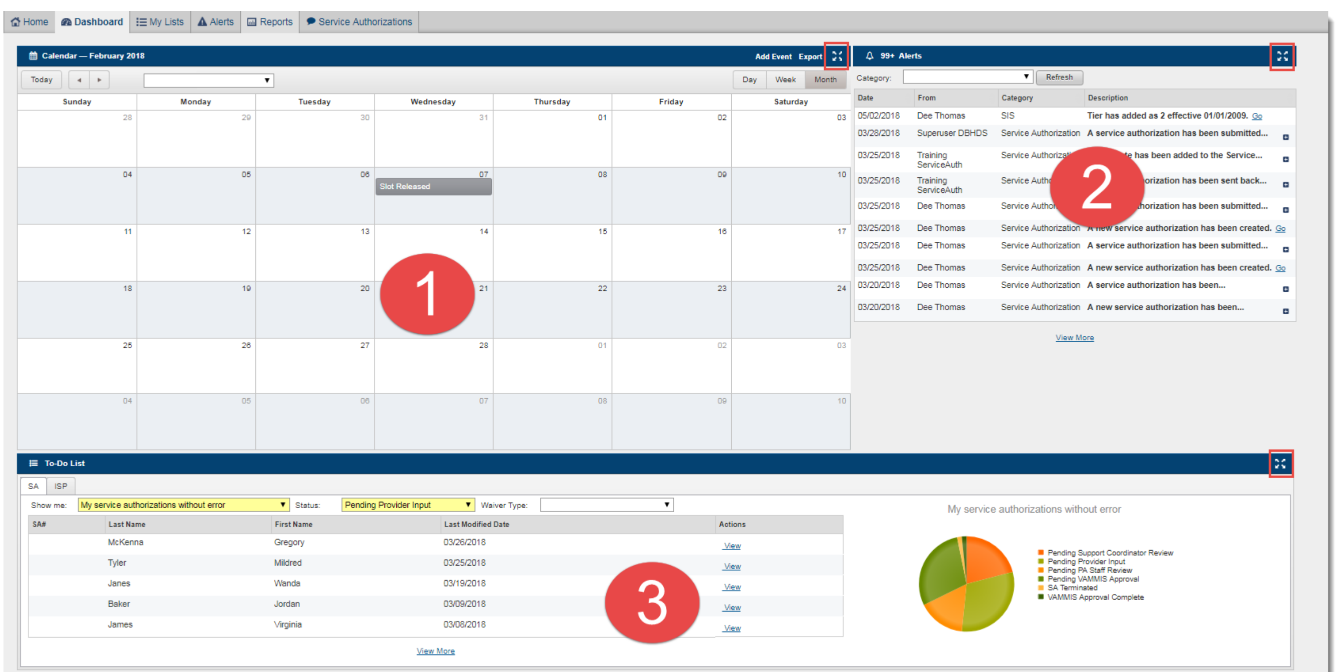


4. Click on **Save**.
5. Click on **Menu**, **Main**, **Home** to return to the WaMs main *Home* page.

8.2 Dashboard

The Dashboard represents a snapshot of activities required and is based on the login role.

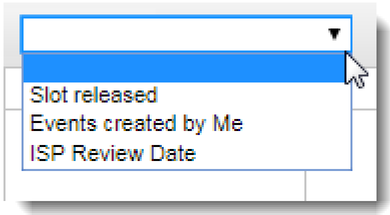
1. Click on the **Dashboard** tab. *The three sections of the Dashboard appear (1) Calendar, (2) Alerts, and (3) To Do List).*
2. Click the **Expand** buttons to open each section in its own window.



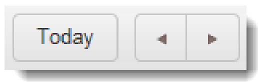
8.2.1 Dashboard Calendar

The dashboard calendar provides system generated reminders and manually added events

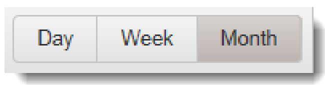
a. Click the calendar drop down arrow to filter view by specific events



b. Click the **Previous** and **Next** arrows next to "*Today*" to change the calendar month.



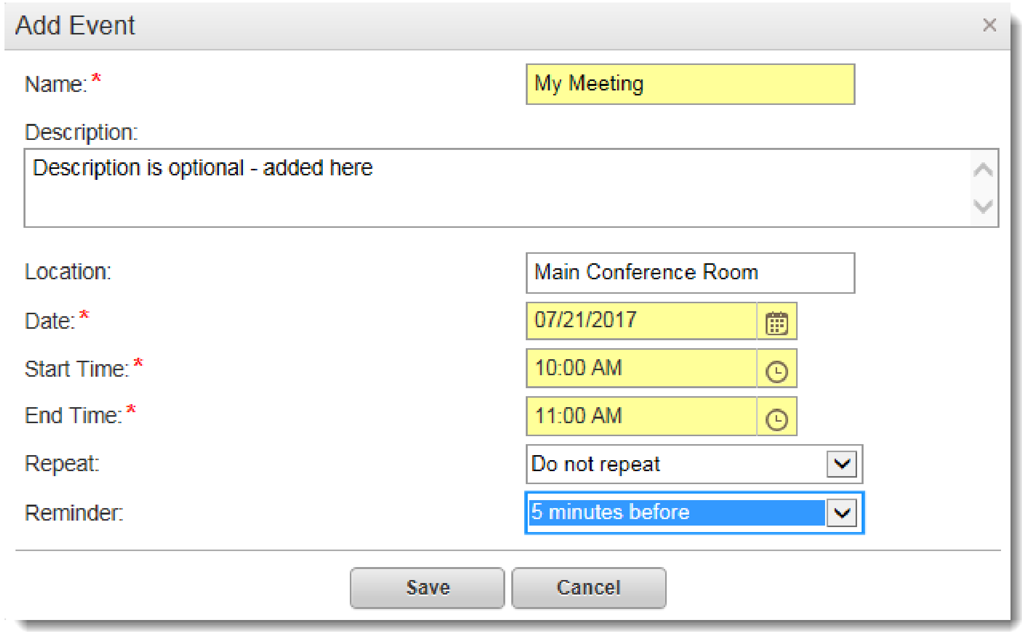
c. Click on the **Day**, **Week** or **Month** for the desired view.



8.2.1.1 Add Event

Meetings or reminders are added to the calendar manually as a one-time or recurring (repeating) event. Click **Add Event** in the Calendar title bar 

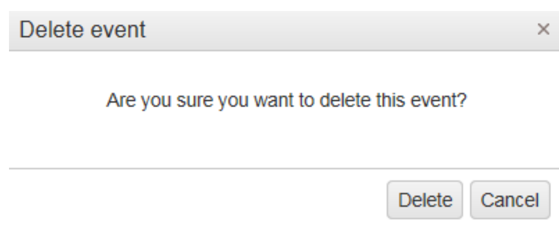
1. Input required information into the *Add Event* window
   a. Name of the event/reminder
   b. Date
   c. Start and End Times
2. Input optional information.
   a. Description or details about the event
   b. Repeat – Identify if or how often the event reoccurs. Recurring options are daily, weekly, monthly or yearly basis if applicable
   c. Reminder – Identify if or when a reminder should be generated
3. Click on **Save.** *The meeting appears in the calendar. Manually added events display in a different color from the system generated events.*



8.2.1.2 *Edit a Manually Added Event*

1. Double-click on the added event. *The Edit/View Event window appears.*
2. Make appropriate changes.
3. Click on **Save.**

8.2.1.3 *Delete a Manually Added Event*



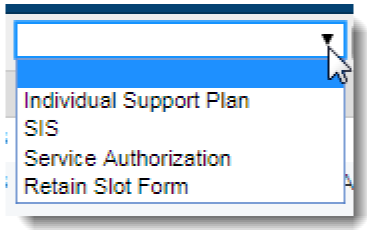
1. Place the Mouse Pointer over event. *An X appears to the right of the Event Name.*
2. Click the **X**. *The Delete Event dialog box appears asking "Are you sure you want to delete this event".*
3. Click on the **Delete** button. *The Event is removed from the calendar.*

8.2.2 Dashboard Alerts

The Dashboard **Alerts** display the last 10 unread alerts in the dashboard sorted by date.

a. The dashboard reflects the number of alerts in the **Alerts** tab is in the upper left corner of the Dashboard Alerts title bar
b. If the number of alerts is below 99 the number displayed will decrease as each alert is clicked on
c. Alerts over 99 will display as **+99** and will remain at that number until there are 99 or less Alerts.

1. Click on the **Category** drop-down arrow to display a specific category *(i.e., alerts related only to the Service Authorization*)



2. Click on the category to be viewed.
3. Click the **+** in the description column to expand the alert and display the **Go** link.
4. Click on **Go** to go directly to the Individual's record. *The record will be opened in a new browser window.*

8.2.2.1 Refresh Alerts

Easily remove viewed and acted upon Alerts from the Dashboard and see newly added Alerts

1. Click on the **Refresh** button*. Acted on and viewed alerts will be removed from the list. Any new alerts will be added*.

8.2.3 Dashboard To Do List

The **To Do List** provides a snapshot of the *SA (Service Authorization)* and *ISP (Individual Support Plan).* Each has a graphic that provides a visual of pending and completed actions.

8.2.3.1 SA (Service Authorization)

View the most recent Service Authorizations by status.

1. Click on the **SA** tab so it is the active tab (displays in white).
2. Click the **Show Me** down arrow to select
   a. My Service Authorizations with error
   b. My Service Authorizations without error
3. Click the **Status** down arrow to select the appropriate status to display:
   a. Pending Provider input
   b. Pending Support Coordinator review
   c. Pending PA staff review
   d. Pending VAMMIS approval
   e. VAMMIS approval complete
   f. Waiver Slot released
   g. SA terminated

4. If necessary, click the **Waiver Type** down arrow to select the appropriate waiver to display
    a. Community Living
    b. Family and Individual Supports
    c. Building Independence

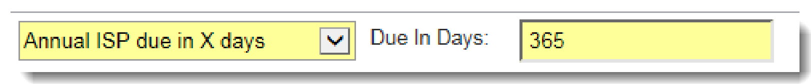
    Results automatically display as each selection is made.
5. Click on **View** to access the specific record in the Person's Details tab.

To view the full *SA* list for individuals click on the **View More** link. The *My List* tab opens in a new window.

8.2.3.2 ISP (Individual Support Plan)

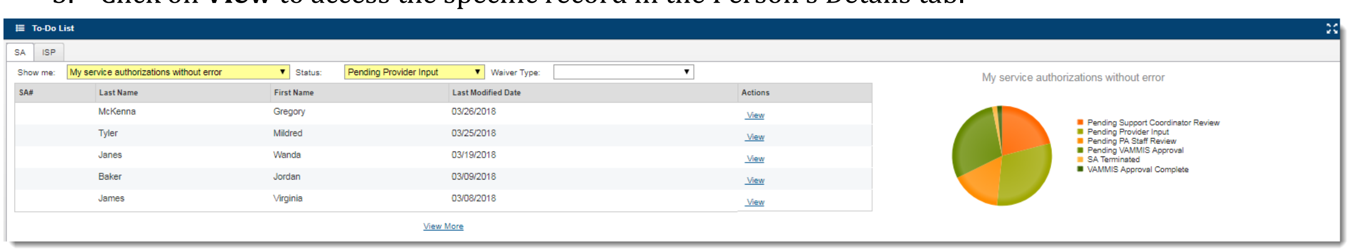
View the most recent ISP status based on selections in the *Show Me* and *Annual ISP* Status fields.

1. Click on the **ISP** tab so it is the active tab (displays in white).
2. Click the **Show Me** down arrow to select
    a. My people
    b. All people (in the CSB)
3. Click the **Status** down arrow to select the appropriate status to display:
    a. Annual ISP overdue
    b. Annual ISP due in X days
        - Add a number in the **Due in Days** field (i.e., 365 to see due in 1 year)



4. If necessary, click the **WaiverType** down arrow to select the appropriate waiver to display
    a. Community Living
    b. Family and Individual Supports
    c. Building Independence

    Results automatically display as each selection is made.
5. Click on **View** to access the specific record in the Person's Details tab.



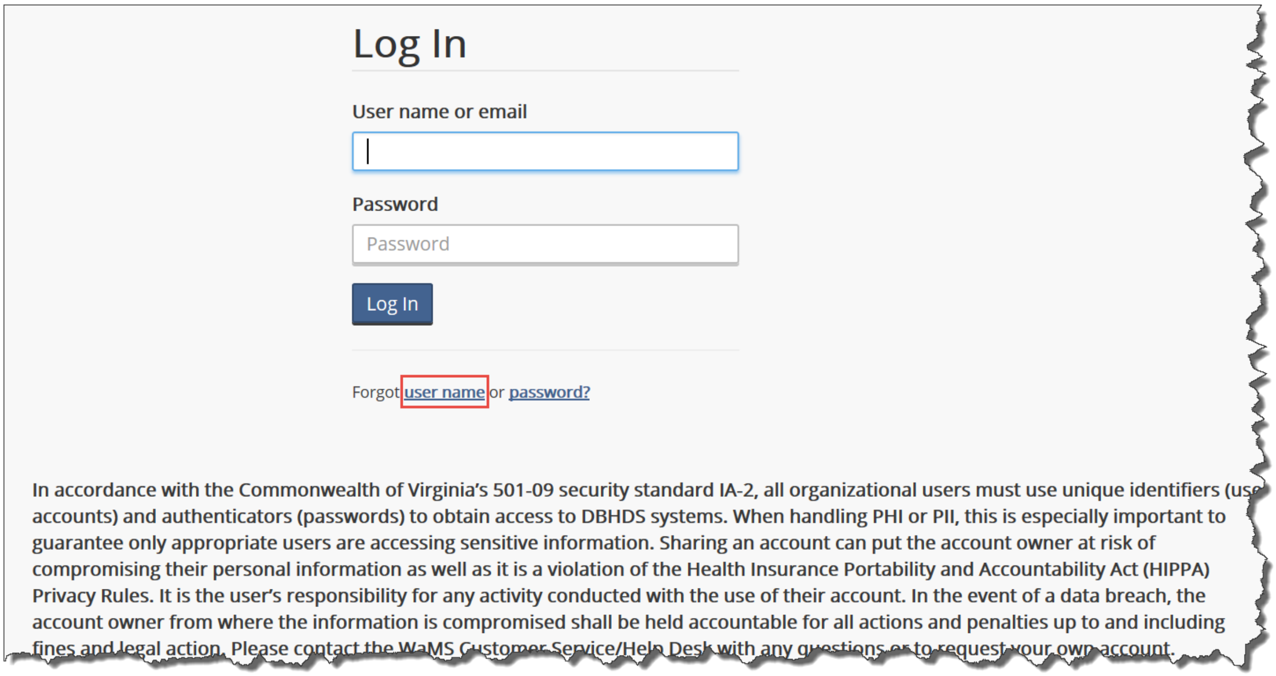
To view the full *ISP* list for individuals click on the **View More** link. The *My List* tab opens in a new window.

8.3 Forgot User Name or Password

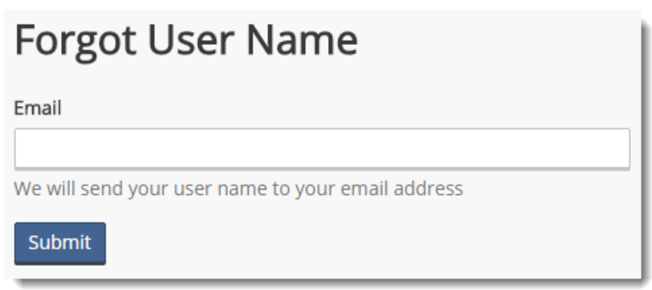
If the *User Name* has been forgotten, the system can send it to the email address that is associated with WaMS. If the *Password* has been forgotten, it can easily be reset by email.

8.3.1 Receive Forgotten User Name

1. At the WaMS **Log In** screen, click **user name**.



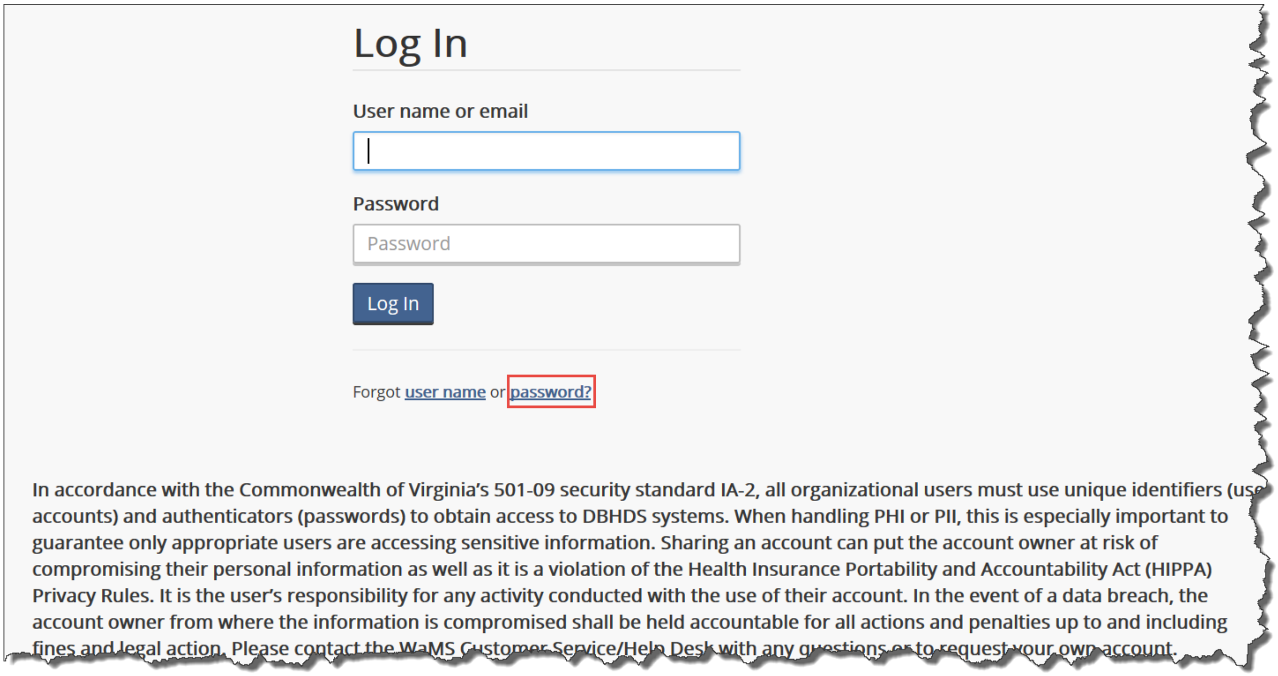
The Forgot User Name window opens.



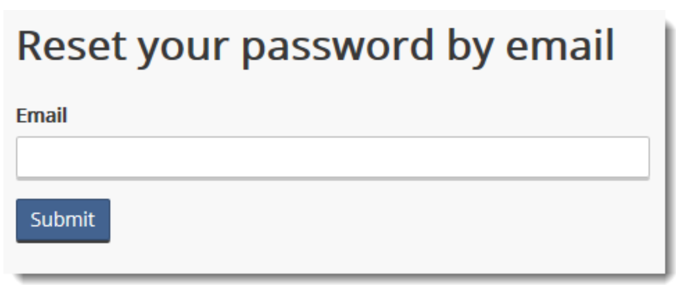
2. Enter the email address associated with the WaMS login.
3. Click on **Submit**.

8.3.2 Reset Password

1. At the WaMS **Log In** screen, click **password?**.

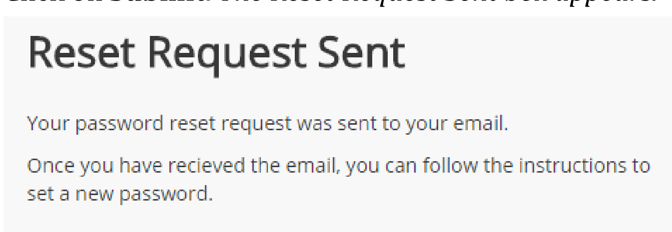


The Reset your password by email window opens.

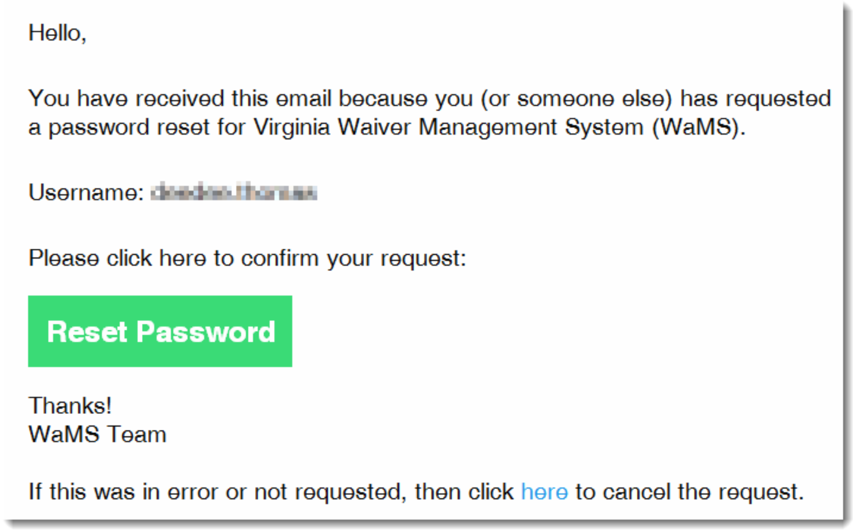


2. Enter the **email address** associated with the WaMS login.

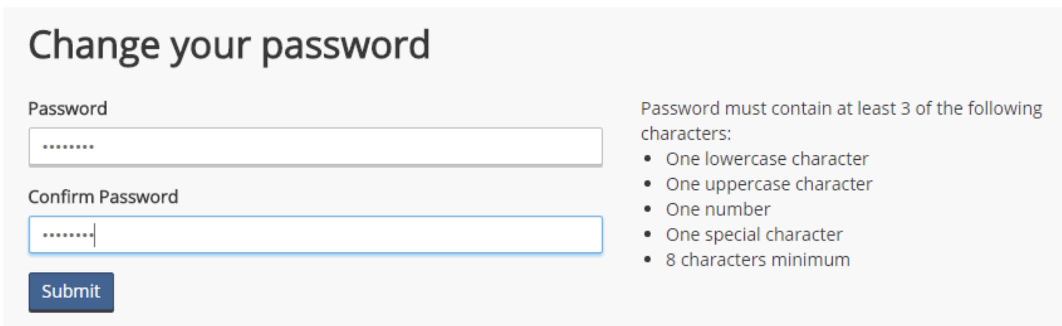
3. Click on **Submit**. *The Reset Request Sent box appears.*



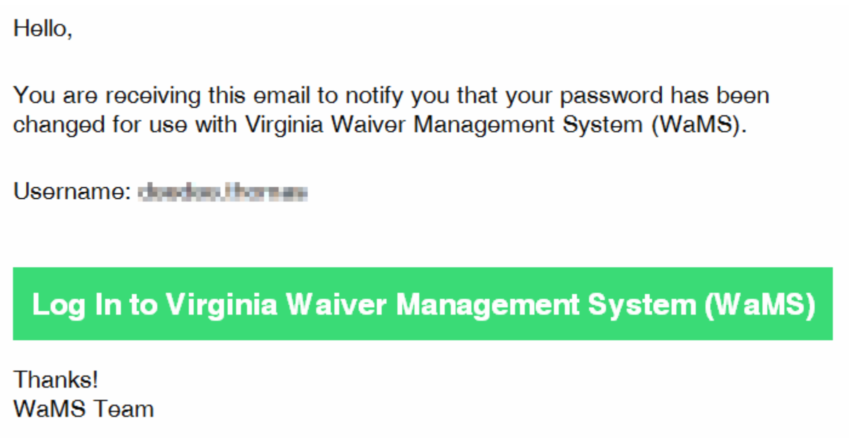
4. Click on the **Reset Password** link in the email to return to WaMS and create a new password.



5. In the *Change your password* window, type in a new **Password**, retype the new password in the **Confirm Password** field, and then click on **Submit**. (*note password parameters below*).



A confirmation email will be sent confirming that your password has been changed.



9 Index

Alerts 1, 2, 6, 7, 12, 42, 59, 72, 74, 75
- Email Notifications 71
- View Alerts 6

Dashboard 1, 72, 74, 75
- Alerts 74, 75
- Calendar 72
- To Do 75

Delegate
- Assign Delegate 60
- Remove Delegate 61

Individual Support Plan 13
- Add Form Note 44
- Add Part V – Complete Use 18
- Add Part V – Modified Use 34
- Attachments 42, 43
- Complete ISP 44
- Complete Part V – Modified Use 42
- Contributor not here for planning 17, 27, 41
- General Schedule of Supports 23, 38
- ISP Symbols 14
- Part III – Shared Planning 18
- Part IV – Agreements 14
- Part IV - Signatures 14
- Part V - Add Outcome 22, 37
- Part V - Complete 29
- Part V – Plan for Supports – Complete Use 13, 18
- Part V – Plan for Supports – Modified Use 13, 33
- Part V - Revise 29, 30, 31
- Part V - Safety Restrictions 28
- Part V - Signatures 25, 26, 39, 40
- Part V Status 33
- Print 46
- Schedule of Supports 24
- Schedule of Supports - Edit 25
- Schedule of Supports Calendar 24
- Signatures 15, 17, 27, 29, 41

Log In 1, 67, 69, 70, 77, 78

Menu 4, 59
- Administration / User Directory 59
- Feedback 64
- Main 59
- My Information 4, 59
- My Organization 4
- My Organization Unit 62
- My Profile, Overview 59
- Print 66
- Tools 62

My Lists 2, 9, 42
- ISP 9
- Recertification (ISP) 10
- Service Authorizations 11

My Profile Menu
- My Delegations 60

Password 77
- Forgot User Name 77
- Reset Password 78, 79

Person's Details 3

Print
- ISP 46
- Screen Print 66

Reports 2

Roles 4
- CM Provider 4
- Provider Admin 4
- Provider Billing 4
- Provider ISP Approver 4

Search Filter 12

Service Authorizations 3, 47
- Add Notes 50
- Add Services 48
- Edit 53
- End Service Line 57, 58
- Modify 57
- Notes 50
- Pend 53, 54, 57
- Revise 54, 56
- Submit 52
- View Notes 50

Service Definitions 62, 63

Tabs
- Alerts 2
- Dashboard 2
- Home 2, 59, 72
- My Lists 2
- Person's Details 3
- Reports 2
- Service Authorizations 3

User Name 77