Recommended for staff members using WaMS who would like very detailed process direction.

Step #	Action / Tab	Window Name	How To Do	Miscellaneous Notes
1	**Search for a Person** / People tab	People tab Search window	1. Click on People tab 2. Input search criteria 3. Identify Assigned CSB 4. Click Search	-All functions start with a Search unless in the Person's Information -If not creating a new person, skip to the appropriate action / tab
2	**Create New Profile** / People tab	Whichever is applicable: Search window ***OR*** Create new Person pop-up	1. Verify search did not identify an individual matching the search criteria 2. Click on Add Person link, right side of the search box ***OR*** 3. If the Create New Person pop-up occurs, click OK	
3	Person's Detail tab *(WaMS automatically transitions to this tab.)*	Person's Demographic Information	1. Input required information a. First Name b. Last Name c. Date of Birth (easier to type in) rather than using calendar) d. Gender e. County f. SSN 2. Input optional Information 3. Click Save & Continue	-"City of" listings are at the bottom of the County drop down -Best practice – Identify Primary Language
4		Person's Phone Number, Email, Address – 1 window for each of above	For all 3: 1. Identify the Type (if requested) 2. Input required information 3. Click Save & Continue	- Click Skip if the individual does not have one of these (Note: Edit in Person's Overview section to add/change information later)
5		Representative Contact Form	1. Input required information a. First Name b. Last Name c. Relationship to Person d. Phone Type e. Phone Number 2. Input optional information 3. Click Save & Continue	-Click Skip if information is unavailable
6		Diagnosis	Optional 1. Click Select Options to get the drop down 2. Click on the diagnosis 3. Click Save & Finish	-Multiple diagnosis may be clicked on -Click Skip if information is unavailable

				(Note: Diagnosis must be entered before a person can be added to the Waitlist later in the workflow)
	Assign CSB	*N/A*	*N/A*	*Automatically assigned by WaMS if the logged in as a CSB belonging to a CSB Organization Unit*
7	**Assign SC**/ Assignment tab	Assignments	1. Click on the Assignments tab 2. Click on Support Coordinator Assignment	WaMS does provide a reminder to assign the SC -If SC is not assigned, CSB does not receive Alerts
8		CSB Support Coordinator Assignment List	1. Make sure default in CSB field is accurate. Change if not. 2. Click Unassigned in the Show Me drop down 3. Click Filter 4. Locate the individual, scroll down if necessary 5. Click in the box to the left of the Person's information 6. Click in the Primary Staff Assignment field 7. Using the drop-down if necessary, click on the SC the person will be assigned to 8. Click Assign	-Filter columns by clicking on the up/down arrows to make finding the person easier.
9	**VIDES** / People tab	Search Window	1. Click on People tab 2. Input search criteria 3. Click Search 4. Click Summary in the Actions column	
10		Personal Summary	1. Click on Screening and Assessments in the left hand menu 2. Click VIDES 3. Click on the Create New button on the right side of the screen	- WaMS defaults to the Person's Details tab
11		Select VIDES Version pop-up	1. Input the Survey Date 2. Click Continue	-Assessment needed (Adult, Child, Infant) will automatically calculate based on date entered and Person's DOB
12		VIDES Summary	1. Click Start in the VIDES Questionnaire title bar	
13		VIDES – Intake Information	1. Verify the Person is correct 2. Click Next	

			3. Click on the appropriate answer 4. Click Next when all questions on the page have been answered 5. Continue with Steps 3 and 4 until at the last page/category 6. Click Save on the last question screen 7. Click Back to WaMS	
14		VIDES Summary / VIDES Questionnaire	1. Make sure each Section in VIDES Questionnaire section has a Complete Status and Result 2. Click Submit 3. The bottom of the window, VIDES Result Details will be populated	-Any other status or result indicates the VIDES has not been completed -Make note of the incomplete section -Click Edit -Access the applicable Section and answer remaining questions -Follow directions for VIDES – Intake Information
15	**Add to Program Waitlist**	Personal Summary / Person's tab	If not in the Persons Details: 1. Search for person (See: Process 1) 2. Click Add to Waitlist *Option:* If in the Person's Details: 1. Click Person's Information 2. Click Personal Summary 3. Scroll to last category, Waitlist 4. Click Add to Program Waitlist	
16		Add to Waitlist Pop-up	1. Click on Priority field 2. Click on the applicable priority (See Notes for Priority 1) 3. Add known optional information 4. Click OK 5. See message that Person has been added to the Waitlist	Best Practice: If the Person is Priority 1, add the Critical Needs Summary Score (available after clicking Priority 1). Leaving this field blank puts the Person at the bottom of the Priority 1 list.
DBHDS Completes Functions Before Proceeding: Make Slot Available, Create Wave, Add the Slot to the Person				
17	**Check Alerts** / Alerts tab	Alerts	1. Click on Alerts tab 2. Locate Person – search &/or filter as needed 3. Click GO next to the notification	
18*	**Complete Enrollment Status**	Person's Details	1. Click on Programs 2. Click on Enrollment Status	-Search for Person if not accessing from Alerts. See: Step# 1

			3. Click on Create New	
18 - a		Select Waiver	1. In the Select Waiver pop-up, verify the correct Waiver shows 2. Click Continue	
18 - b		Enrollment Status window	4. Click on the applicable New Status 5. Click on Status Change Reason 6. Input the correct Start Date for the status change 7. Input other required information 8. If applicable, Input comments 9. Click Save 10. See updated Status	-It is essential the correct Status Change Reason is selected to ensure the enrollment status is accurate
19*	**Create ISP**	Person's Details	1. Click on Programs 2. Click on Individual Support Plan 3. Validate Waiver in the Select Waiver pop-up 4. Click Continue	
19 - b		Service Detail Information window	1. Identify the applicable ISP Type 2. Input Effective Date 3. Input available optional information 4. Click Save	
19 - c		Individual Support Plan - Summary	1. Click on possible action to the right of the item 2. Complete all required fields 3. Input optional information if applicable 4. Follow action(s) identified	Actions: -Proposed Provider: Search must be completed in order to identify Provider selections -Upload Attachment -Form Notes
19 - d		Completing the ISP	1. Complete above steps as needed 2. Click Complete 3. Click Confirm to submit the ISP	

20*	**Create New Service Auth.**	Person's tab	1. Click on Programs 2. Click on Service Authorization	
20 – a		SA - List	3. Click on Create New	
20 – b		Create Service Authorization window	4. Validate the Waiver Type 5. Click Search next to Provider field 6. Input information known into the Provider Search pop-up 7. Click Search 8. Click Select on appropriate Provider 9. Click Continue	-When adding an additional SA(s), the Provider selected must be different from the previous SA(s) -The SA is sent to the Provider for review prior to being sent back to the SC for review and submission for PA review
21 - c		Note	1. Note(s) may be added by clicking Note 2. Complete all information at top 3. Complete the required Note field 4. Identify who the note is to be sent to 5. Click Save	-Previously created Notes may be viewed by clicking Note

*These steps, completed in conjunction with their corresponding sub steps (i.e.: a, b, c, etc.), may be done in any order.

Reviewing the SA

Step #	Action / Tab	Window Name	How To Do	Miscellaneous Notes
1	Alerts	Home Page	1. Click on Alerts Tab	
2		Alert	1. View or search for the Alert as needed	-Most recent alerts are at the top of the screen -Option to identify Group Results in different ways -Filter columns as needed
3			1. Click Go next to the alert	-Alert indicate the Provider has submitted the SA for the SC review
4	Person's Details	Service Authorization - Summary	1. Click Review next to the existing SA	
5		Service Authorization – Edit	1. Input the Review Date 2. Review and update Requested & Authorized Information if needed 3. Click Save	-The Change History section will be updated with each action

6		Service Authorization - Summary	*Optional* 1. Click Add in Service Details title bar to add additional Service Detail Line Items 2. Complete required fields 3. Click Save	
7			*Optional* 1. Click Note to view or add a note 2. If adding, complete all fields and click Save	
8			1. Click Submit for Review	-SA is sent to PA for review prior to submission to VAMMIS -Continue to monitor Alerts for status updates

Additional resources are available by accessing the WaMS Home Page, Training Resources section.

- CSB User Manual
- CSB Workflow and SA Job Aid – See page 2 for a visual of the SA process