

Department of Behavioral Health and Developmental Services

Navigating IDOLS

(Intellectual Disability On-Line System)

Virginia's Electronic ID/DS Waiver Waiting List, Slot Assignment and Enrollment System



Revised 10/25/12

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Introduction

In 2006, the federal Centers for Medicare and Medicaid Services (CMS) awarded a Systems Transformation Grant to Virginia designed to make significant improvements to the infrastructure of the service delivery system for individuals with developmental and other disabilities. One goal (Goal 4) of this grant has been a joint project under the leadership of the Department of Behavioral Health and Developmental Services (DBHDS) and the Department of Medical Assistance Services (DMAS). The goal has focused on the use of integrated systems to monitor critical incident reporting across the service delivery spectrum, and to automate and manage specific functions of the ID (Intellectual Disability) and DS (Day Support) Waivers.

The Intellectual Disability On-Line System (IDOLS) is laid out similarly to the existing paper system. The electronic system is entered through a web portal on the DBHDS web site. The regulations and process flow are the same; however, the format for submitting this information is now electronic. A person may only be placed on the statewide waiting list by meeting the current criteria.

Slots continue to be assigned by the CSB through the process described in the MR/ID Community Services manual. Once assigned, acceptance and slot assignment is entered into the system, and enrollment is processed in IDOLS electronically.

The electronic submission of ISARs is expected in fall of 2011. The paper system will remain in place throughout the phase-in period (30 days following the commencement of initial training) and will be **temporarily** used in the event of an emergency when the IDOLS system may be down and unavailable.

Logging into Delta and the IDOLS Application

DELTA is the internet portal used to access IDOLS and other DBHDS applications. Each CSB/BHA may have two or three representatives from management assigned DELTA oversight depending on the size of the CSB. These representatives will oversee IDOLS permissions/role assignments at the CSB location and will have back-up staff identified. These include:

DELTA Security Officer: This role can process account requests for their CSB (except for their own account) and perform user functions. They will set up the Supervisor and Local Administrator. They can also perform administrative resets on accounts.

DELTA Supervisor: This role can submit account requests for their CSB (except for their own account) and perform user functions.

Local Administrator: This role enters all user requests for IDOLS roles in DELTA.

The agency account for the DELTA Security Officer are set up for the CSB/BHA by DBHDS IT staff from the *DELTA Account Request Form (On the ODS web site)* . Large providers may choose to set-up a local administrator at each site. More details are available on the web site under [How to use the DELTA portal for IDOLS](#).

Information Technology Services

Phone Number: (804) 371-4695

Email Address: deltaprod@dbhds.virginia.gov

Fax Number: (804) 786-2029

Please have your Exec send an email identifying the Security Officer to deltaprod@dbhds.virginia.gov on the DELTA Account Request Form prior to contact for DELTA registration. The DELTA request for agency set up should be completed on the form.

A Login and a Password will be sent automatically once your IT person has submitted your information as an authorized user (based on the roles and permissions your supervisor sent to IT to enter).

Once you have established access to DELTA, the Delta Portal can be accessed at <https://delta.dbhds.virginia.gov> or from the main page of www.dbhds.virginia.gov. Just click on the DELTA logo in the left column of the main page as seen below:

The screenshot shows the website for the Virginia Department of Behavioral Health and Developmental Services. At the top, there is a navigation bar with 'Virginia.gov', 'Online Services | Commonwealth Sites | Help | Governor', and a search box labeled 'Search Virginia.gov'. Below this is a dark blue header with the department's name. A secondary navigation bar includes 'Home', 'Contact Us', and 'Search this Site'. The main content area is divided into three columns. The left column is a navigation menu with links for 'DBHDS' (About, Contact Us, Jobs, Procurement, Public Information) and 'PROGRAMS & SERVICES' (Mental Health, Developmental Services, Substance Abuse Services, Child & Family Services, Human Rights). The middle column contains a 'WELCOME' message, a paragraph about the state's public mental health system, a link to 'Please click here if you need immediate help.', and a paragraph about the department's work with stakeholders. The right column is titled 'Recent News' and lists several news items with dates.

RESOURCES

- Item 304.N Fiscal Year 2010 Annual Report
- Developmental Services
- Autism Plan - Response to JLARC
- Comprehensive State Plan 2010 - 2016
- More News Releases
- Quick Links**
- Calendar
- DBHDS Films and Videos
- Forms & Reports Search
- Licensed Provider Search
- Offices & Staff
- Person Centered Practice

Below is the Delta Login Screen for authorized users.

Virginia.gov Online Services | Commonwealth Sites | Help | Governor

Search Virginia.gov

Virginia Department of **Behavioral Health and Developmental Services**

Home Contact Us | Search this Site

Resources

- Help
- About
- Contact Us
- Privacy Policy

DELTA

Login

▶ Username:

▶ Password:

Log In

[Forgot Password](#)

The security of your personal information is important to us!

Diligent efforts are made to ensure the security of Commonwealth of Virginia systems. Before you use this Web site to conduct business with the Commonwealth, please ensure your personal computer is not infected with malicious code that collects your personal information. This code is referred to as spyware. The majority of spyware is installed on your computer without your knowledge and without your consent.

Passwords will be required to change every 60 days and cannot be repeated for the first 12 uses.

Once you have logged into Delta successfully, select “My Applications” in the left hand column to access the link to the IDOLS application (see 1 and 2).

DELTA - Windows Internet Explorer provided by VA IT Infrastructure Partnership

https://delta.dhds.virginia.gov/delta/Default.aspx?Environment=Test

Virginia.gov

Virginia Department of **Behavioral Health and Developmental Services**

Home > My Account > My Test Applications

My Account

- My Applications
- My Test Applications
- Change Password
- Change Security Question
- My Information
- Change Location
- Logout

Resources

- Help
- About
- Contact Us
- Privacy Policy

DELTA

IDOLS

Intellectual Disability On Line System

The IDOLS link will take you to the home screen where you will be able to view your username, role and location. There are 3 possible roles assigned by those in DELTA oversight positions at the CSB. Each is defined in the following chart.

Role	Description
CSB Submitter	Functions limited to requesting additions to the waiting list and new enrollments, updating WL records, updating certain elements of the enrollment records and service authorization approvals.
CSB Wait List Approver	Enters and approves waiting list submissions. Submits and views Enrollment records. Removes individuals from the Wait List. Also has service authorization approval.
CSB Enrollment Approver	Enters and approves ID and DS Waiver WL records, enrollments and communicates with Community Resource Consultants on waiver slot assignments and requests to retain slots. Also has service authorization approval. Have all functions in IDOLS.

Permissions and Responsibilities

There are 4 CSB roles with the IDOLS System as follows: CSB DELTA Account Oversight, CSB Submitter, CSB Wait List Approver and CSB Enrollment Approver.

IDOLS permissions for these roles are included in the following chart (oversight roles have access to all CSB functions):

<u>Permissions</u>	<u>IDOLS Web Roles</u>		
	CSB Submitter	CSB Waitlist Approver	CSB Enrollment Approver
Waitlist			
Submit Waitlist Record	Yes	Yes	Yes
Approve Waitlist Record		Yes	Yes
View Waitlist Records	Yes	Yes	Yes
Edit Waitlist Record	Yes	Yes	Yes
Remove from the WL		Yes	Yes

Enrollment			
Submit Enrollment Record	Yes	Yes	Yes
Approve Enrollment Record			Yes
Edit Enrollment Record	Yes	Yes	Yes
Release from the Waiver			Yes
View Enrollment Records	Yes	Yes	Yes
Waiver Slot Assignment Committee Results			
Request CRC Slot Assignment Review			Yes
View CRC Response			Yes
Retain Slot Reviews			
Submit Retain Slot Request			Yes
View CRC Response			Yes

Your role is identified on the IDOLS home screen. Check to be sure it is correct.

Virginia Department of Behavioral Health and Developmental Services

Home

Waitlists

- Urgent Waitlist
- Non-Urgent Waitlist
- DS-U [Waitlist]
- DS-II [Waitlist]
- Waitlist - All

Manage Waitlists

- New Waitlist Individual
- Awaiting CSB Approval
- Denied CSB Approval

Manage Enrollments

- Active Waiver Enrollments
- Projected Waiver Enrollments
- Waiver Enrollments on Hold
- Awaiting CSB Approval
- Denied By CSB

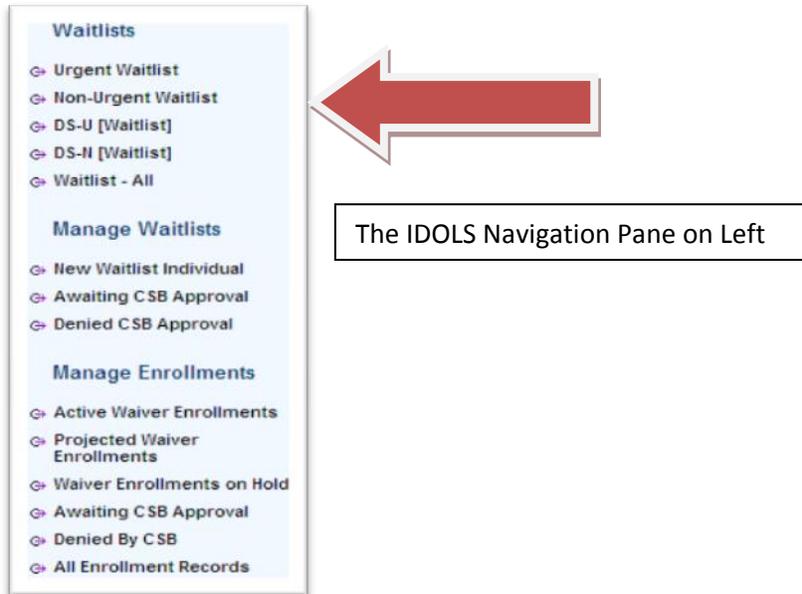
HOME

Welcome to the IDOLS Portal
Username: EWceffbe

Current Role: CSB Enrollment Approver

Current Location: Blue Ridge Behavioral Healthcare
Location Identifiers:
AVATAR: 067
OLIS: 070

The column to the left provides easy access to all of IDOLS features. The main categories include: Waitlists, Manage Waitlists, Manage Enrollments, Individuals, Slots and CRC Approvals.



Viewing and Managing the Waiting Lists

Options for viewing and managing the wait list are included at the top of the IDOLS navigation pane. What you view here under WL is:

- Urgent Waitlist - all individuals at your CSB currently on the Urgent Waiting List
- Non-Urgent Waitlist - all individuals at your CSB currently on the Non-Urgent Waitlist
- DS-U - all individuals at your CSB currently enrolled in the Day Support Waiver *who remain on the Urgent Waitlist*
- DS-N - all individuals at your CSB currently enrolled in the Day Support Waiver *who remain on the Non-Urgent Waitlist*
- Waitlist-All - all individuals currently on the Urgent and Non-Urgent Waitlists at your CSB.



Select the desired view from the IDOLS navigation pane by clicking with your left mouse button. Below, you see that the Urgent Waitlist has been selected. After selecting the desired Waitlist, select the individual to view his or her information.

Sorting the Columns - Each column may be sorted in any view by clicking on the column heading.

Viewing the Waiting Lists – Sorting Columns

The screenshot shows a web browser window displaying the Virginia Department of Behavioral Health and Developmental Services. The page title is "Waitlist - Urgent (5 Total Records)". The table below shows the following data:

List Type	Status	Individual	SSN	Medicaid ID	Date Of Request	Date of Need	Last Contacted
Select	Urgent	Urgent Waitlist	0011000	01010001011	2/1/2011	2/1/2011	3/2/2011
Select	Urgent	Urgent Waitlist	01001777	12000477110	3/1/2011	3/10/2011	3/2/2011

A callout box titled "Waitlist - Urgent (5 Total Records)" provides a larger view of the table. A red arrow points to the "Select" button next to the record for "Hicupp, Wild Bill". A blue box at the bottom right of the callout contains the text "Select individual".

“Viewing” provides the following information:

Identifying Information (DOB, Medicaid #, SSN, CSB#, WL Status), LOF results, ISP dates, living situation and exam dates, confirmation of choice, waiver type, services requested, urgent criteria met and approvals.

Example of Wait List Record for an individual (partial view below):

WAITLIST RECORD - BANANAS, CHAKITA

Individual - Bananas, Chakita

Identifying Information

Name:	Bananas, Chakita	SSN:	098123765
Gender:	Female	Medicaid Id:	123654321678
Birth Date:	2/28/1969	CSB:	HAMPTON-NN CSB
Race:	White	CSB Individual ID:	007
		Waitlist Status:	Non - Urgent Waitlist
		Enrollment Status:	

LOF

Adding an Individual to the Waiting List

Waiting List & Enrollment

The following forms will be replaced by elements of the IDOLS. Individual information may be printed in hard copies as needed. However, paper versions may still be needed if the system is unavailable for more than 3 business days. Word versions can be gotten from your CRC:



Enrollment Request form (DMAS-437 Revised 10-1-10)

Day Support Waiver Level of Care Eligibility Form (DMH 885E 1164DS Rev. 10/1/10)

MR/ID Waiver Level of Care Eligibility Form (DMH 885E 1164 10/1/10)

Slot Change/New Assignment Fax Cover (DMH 885E 1202 rev. 10/1/10)

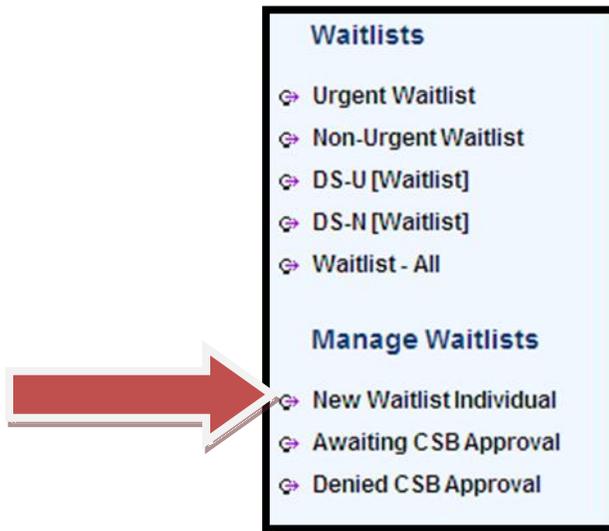
Fax Cover for Any Submission Effecting a Waiting List Change (DMH 885E 1213R 10/1/10)

Plan of Care Summary form (DMAS438, rev. 11/4/10) for annual LOF updates on enrolled individuals.

Status of Request for Placement on the ID/MR Waiver Statewide Waiting List (4/11 rev.) **[ODS Generated]**.

ISARS in PDF format

“Select” New Waitlist Individual to begin a new addition to the waiting list.



Selecting this option will provide the online form (pictured below) for adding a person to the waiting list. A red arrow  indicates a required field.

NEW INDIVIDUAL

(*) Denotes required fields

ist
s
oval

Identifying Information

▶ First Name: Address where individual is living.
 Street Line 1:
 Middle Name: Street Line 2:
 ▶ Last Name: City:
 ▶ Gender:
 ▶ Birth Date: State:
 ▶ Race: Zip:
 ▶ SSN: County/City:
 ▶ of Residence:

Information added in the online form includes: identifying information (name, DOB, address, phone, etc), legal representative with contact information, LOF results, ISP dates and living situation with current date, confirmation of eligibility, confirmation of choice, waiver type, services requested, and urgent criteria met. The **CSB Individual ID is the CSB case record number or unique identifier**. There are a variety of options when selecting a legal representative. Always select “Legal Guardian” when the representative is appointed by a court – otherwise an agency appointed representative or close friend or family member may be chosen. Nothing is selected if they do not have a representative.

Legal Representative



Next the ISP start date (if there is an ISP) and living situation are entered. The ISP end date will be automatically calculated by the system when you select the end date text box (NOTE: the end date can also be overridden and changed). The ISP Dates can be edited by both Submitters and Approvers. There are a variety of living situations to choose from as indicated below. Living

situation should be updated annually. Finally, enter the “current date” for the living situation section, as well as the total number of people with disabilities residing in the home including the individual. If the person has not yet moved into the Waiver living situation, select the living situation where they will be on the Waiver.

ISP Dates

ISP Start Date: / /

ISP End Date:

Living Situation

▶ Living Situation:

▶ Living Situation Date: / /

▶ Number of persons with disabilities:

Select one...

- Adult Foster Care Home
- Applicant to State or Community ICF/MR
- Children's Foster Care
- Children's Group Home
- DSS-licensed ALF
- DSS-licensed ALF, no waiver CRS
- Group Home
- Lives alone
- Sponsored Placement / Family Training Home
- Supported Living/apartment
- With parent(s)/relatives

The results of the Level of Functioning (LOF) survey are entered for individuals on the waiting list. Enter the date and results for the completed survey.

Level of Functioning

▶ LOF Date:

Category 1: Health Status Dependency

Category 2: Communication Dep.

Category 3: Task Learning Skills Dep.

Category 4: Personal Self Care Dependency

Category 5: Mobility Dependency

Category 6: Behavior Dependency

Category 7: Community Living Skills Dependency

Met Not Met

Eligibility and Choice Information

IDOLS also will hold information that confirms certain waiver requirements, such as diagnostic eligibility and that an individual has selected ID Waiver services. The psychological and/or developmental evaluation and Individual Choice form must be maintained in a paper format for Quality Management Review.

Below is IDOLS' confirmation of diagnostic eligibility and individual choice. Complete the Psychological or Developmental Risk depending on age.

Eligibility Information

Psychological Evaluation: 05/01/2011
Psychological evaluation reflects current functioning; diagnosis of MR/ID.

Developmental Evaluation: 03/06/2011
Developmental evaluation reflects current functioning; diagnosis of MR/ID or is at developmental risk.

Choice Information

All waiver services reviewed with individual.

Individual selected waiver services vs. institutional

Date form signed by individual or representative: 5/1/2011

By completing this form the support coordinator certifies that the appropriate signed documents are on file.

TYPE of Waiver- If currently on another Waiver, indicate that here:

Type of Waiver

If currently in another Waiver select that Waiver from the drop down list.

Current Waiver Type: Select one...
Select one...
Alzheimer's Assisted Living (AAL) Waiver managed by the Care Coordination Services Unit
Aid/HIV
Elderly or Disabled with Consumer Direction (EDCD)
Technology Assisted (Tech)

WAITING LIST Assignment – Indicate whether the person is being placed on the Urgent Waitlist or Non-Urgent Waiting List:

Waiting List Assignment

Waitlist Type: Non-urgent
Non-urgent
Urgent

When selecting the Urgent WL, the reasons will pop up. Please select two that best fit the individual. Only one is required, so you can select "none" for the second reason.

Urgent Waitlist Criteria

Meets Urgent Criteria

Urgent List
Reason 1:

Select one...

- Select one...
- Primary caregiver is 55 years of age or older
- Primary caregiver can no longer care for person
- Risk of abuse or neglect or exploitation
- Primary caregiver has a chronic or long term physical condition
- Aging out of publicly funded residential placement
- Risk of health or safety to others living in home due to person's behavior
- Risk of health or safety to others living in home due to person's physical care needs

Next, services requested by the individual and family are indicated by marking the corresponding boxes. Check all the services that apply.

Waiver Services Requested

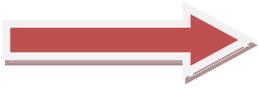
These are services that the individual is waiting to receive. Please check all that apply.

- Therapeutic Consultation, Behavioral
- Therapeutic Consultation, Occupational
- Therapeutic Consultation, Physical
- Therapeutic Consultation, Psychological
- Therapeutic Consultation, Therapeutic Recreation
- Therapeutic Consultation, Speech
- Congregate Residential Support
- Day Support
- Crisis Stabilization
- In-Home Residential Support
- Personal Emergency Response System (PERS)
- Supported Employment
- Prevocational Services
- Personal Assistance Services
- Environmental Modifications
- Skilled Nursing Services
- Respite Services
- Assistive Technology
- Companion Services

Once the information is provided, select "Submit" at the bottom of the screen to request addition to the waitlist.

- Personal Emergency Response System (PERS)
- Supported Employment
- Prevocational Services
- Personal Assistance Services
- Environmental Modifications
- Skilled Nursing Services
- Respite Services
- Assistive Technology
- Companion Services

Submit



The requested addition will then be available to a CSB Waitlist Approver for final approval.

In some circumstances, IDOLS will not proceed until corrections are made to the waiting list request.

NEW INDIVIDUAL

- First name is required.
- Last name is required.
- Gender is required.
- Birth Date must be a valid date in the past.
- Race is required.
- SSN is required.
- CSB Individual ID is required.
- County/City is required.
- Living Situation is required.
- Living Situation date is required.
- Size of home is required.
- LOF date is required.
- The individual must meet at least 2 criteria.
- All waiver services must be reviewed with individual.
- Individual must select waiver services.
- Date signed is required.
- Date first requested is required.
- Date of need is required.
- Last date of contact is required.

(>) Denotes required fields

Wait List Approver adds new additions by selecting from the IDOLS Navigation Pane.

sts
Individual

- Awaiting CSB Approval
- Denied CSB Approval

Below is the view of an individual record awaiting approval. The WL Approver should select the individual, confirm the accuracy of the information, and select Approve or Deny as appropriate to process the request.

WAITLIST BY CSB - AWATING CSB APPROVAL (1 TOTAL RECORDS)

Waitlist - Awating CSB Approval (1 Total Records)

List Type	Status	Individual	SSN	Medicaid ID	Date Of Request
<input type="button" value="Select"/>	Urgent	Awaiting CSB Approval	Tut, King	333333333	5/1/2011

1 Total Records

The Waitlist Approver selects the appropriate option from the drop down menu and then selects "Approve/Deny Waitlist." Results will be immediately available in the IDOLS system

If someone has not yet been added to the WL, but has been selected by the "Waiver Slot Assignment Committee" as the most urgent to receive an available slot, the individual must be added to the Urgent WL via the above steps prior to enrolling. Once an individual is enrolled into a Waiver, CSB staff will update the IDOLS system on an annual basis in lieu of completing the Plan of Care Summary form. Individuals transitioning from with a Facility or Trust Fund slot must be added to the NON-URGENT list prior to enrollment.

**If a request is denied by the approver, the submitter must reenter the submission with corrected information as a new person and re-submit or request a re-activation from Vivian Stevenson. Alternately, the WL Approver can make needed corrections to the information provided in the WL request completed by the Submitter.

****A Note About Day Support Waiver and the ID Waiver Waiting Lists...**

While there is no separate Day Support Waiver (DSW) waitlist, IDOLS maintains a separate listing of those receiving the DSW who have chosen to remain on the statewide waiting list awaiting an ID Waiver slot. This is a necessary feature to track individual names on the Day Support

Waiver. The option to maintain a person on the waiting list is integrated into the IDOLS Day Support enrollment process.

Editing an Existing Waiting List Entry



To edit an existing WL entry, select the desired Waitlist from the Navigation Pane and then select the correct individual's name in order to view and edit information (see 1 and 2).

1

Waitlists

- [Urgent Waitlist](#)
- [Non-Urgent Waitlist](#)
- [DS-U \[Waitlist\]](#)
- [DS-N \[Waitlist\]](#)
- [Waitlist - All](#)

Manage Waitlists

- [New Waitlist Individual](#)

2

Waitlist - Urgent (5 Total Records)

List Type	Status	Individual	SSN	Medicaid ID	Date Of Request	Date of Need	Last Contacted
Select	Urgent	Urgent Waitlist	Abbott, Mega	101130201	5/27/2011	6/1/2011	5/27/2011
Select	Urgent	Urgent Waitlist	Hicupp, Wild Bill	153957421	456987123963	3/1/2011	3/30/2011

“Select” individual

WL Approvers and Submitters can scroll to the bottom and select “Edit Waitlist Record” (see 3).

Approval

Approval Status: Approved

Submitted By: _____

Submitted Date: 4/1/2011

Approved/Denied By: _____

Approved/ _____

3



Options for editing a waitlist record include:

- WL Approvers and Submitters can view, edit and make changes for LOF results, living situation, exam dates, plus the waitlist type, urgent criteria met and services requested.
- Only WL Approvers can approve WL records.
- Any changes in “Name” or the “Identifying Information Section” can only be completed by ODS staff.

CSB Submitters and WL Approvers can access the LOF, living situation and exams at anytime by viewing the waitlist record as follows:

The screenshot shows a web form titled "LOF" with several sections:

- LOF Table:** A table with columns "Date", "LOF Met", and "Details". The first row shows "5/29/2011", "Met", and "Health Statu". Below the table is an "Update LOF" button.
- ISP Dates:** A section with a label "ISP Start Date:" and an empty input field.
- Living Situation:** A section with a label "Living Situation" and the text "DSS-licensed ALF, no waiver CRS". Below it is an "Update Living Situation" button.
- Exams Table:** A table with columns "Exam Type", "Date", and "Confirms". It contains three rows: "Physical" (5/29/2011, False), "Psychological" (5/29/2011, True), and "Physical" (4/24/2010, False). Below the table is an "Add Exam" button.

Red arrows point to the "Update LOF", "Update Living Situation", and "Add Exam" buttons.

After providing the completion date and scoring the LOF, select “Save LOF.”

This partial screenshot shows the "LOF Date" field with the value "5/1/2011". Below it, the text "Category 1: Health Status Dependency" is visible. To the right, there are two radio buttons: "Met" (which is selected) and "Not Met".

To edit a living situation and effective date, enter the new updated information and provide the number of people with disabilities living in the home, then select “Save Living Situation.” If at home, just enter **today’s** date.

The screenshot shows a web form titled "Living Situation". It contains three input fields: "Living Situation" (a dropdown menu showing "Select one..."), "Living Situation Date" (containing "06/13/11"), and "Number of persons with disabilities" (containing "4"). A "Save Living Situation" button is highlighted with a red oval. A dropdown menu is open, displaying a list of living situation options: "Select one...", "Adult Foster Care Home", "Applicant to State or Community ICF/MR", "Children's Foster Care", "Children's Group Home", "DSS-licensed ALF", "DSS-licensed ALF, no waiver CRS", "Group Home", "Lives alone", "Sponsored Placement / Family Training Home", "Supported Living/apartment", and "With parent(s)/relatives".

To edit the type of exam (developmental, physical or psychological) that is on file and the date it was completed, enter the new information and then select “Save Exam” to update the

information into the IDOLS database. Complete once for each exam on file and update as needed. **Note that a physical exam is not required for those on the Waiting List only.**

The screenshot shows a form titled "EXAM". It contains two fields: "Exam Type" with a dropdown menu set to "Select one..." and "Exam Date" with a text box containing "06/13/11". Below these fields are two buttons: "Save Exam" (circled in red) and "Cancel". An inset window shows the dropdown menu for "Exam Type" with the following options: "Developmental Eval", "Physical", and "Psychological".

Additional elements can be edited by selecting "Edit Waitlist Record" at the bottom of the screen.

This screenshot shows the bottom portion of a form. It includes fields for "Approved/ Denied By:" (with the name "Rheinheimer, Gail") and "Date:". Below these are fields for "Approved/ Denied Date:" (with the date "6/3/2011"). At the bottom, there are four buttons: "Edit Waitlist Record" (highlighted with a red arrow), "Remove Individual From Waitlist", "Request Enrollment", and "Done".

WL Approvers and Submitters are able to edit additional elements such as waitlist type, urgent criteria and requested Waiver services.

The screenshot shows a form titled "Urgent Waitlist Criteria". It has a checked checkbox for "Meets Urgent Criteria". Below this are two dropdown menus for "Urgent List Reason 1:" and "Urgent List Reason 2:". The "Reason 1" dropdown is open, showing a list of reasons: "Primary caregiver is 55 years of age or older", "Primary caregiver can no longer care for person", "Risk of abuse or neglect or exploitation", "Primary caregiver has a chronic or long term physical condition", "Aging out of publicly funded residential placement", "Risk of health or safety to others living in home due to person's behavior", and "Risk of health or safety to others living in home due to person's physical care needs". A red arrow points to the "Reason 1" dropdown. Below the reasons is a section titled "These are services that the individual is waiting to receive" with a circled instruction "Please check all that apply". This section contains a list of services with checkboxes: "Therapeutic Consultation, Behavioral", "Therapeutic Consultation, Occupational" (checked), "Therapeutic Consultation, Physical", "Therapeutic Consultation, Psychological", "Therapeutic Consultation, Therapeutic Recreation" (checked), "Therapeutic Consultation, Speech", and "Congregate Residential Support".



Select "update" under the Approvers role at the bottom of the page to save the edited information.



Adding Back Someone Removed from the Waitlist

- Once a person has been removed, you have 2 options for placing them back on the WL if needed.
 - You can reenter all the information as a new WL individual or
 - You can call Vivian and have her move them from Inactive to active back on the WL



> Manage Enrollments > Inactive Location: Hampton-Newport News Community Services Board

ALL ENROLLMENTS - (7 TOTAL RECORDS)

	Slot	Individual	Enrollment Status	Status Date	Enrollment Date
Select	CHILDRENS_08_4	Bananas, Chakita	Opened in Error	6/30/2011	5/25/2011
Select	ID Community_96_142	Bananas, Chakita	Moved out of State	5/27/2011	6/8/2011
Select	Day Support_06_60	Doobie, Margie	Change in Status	8/25/2011	4/7/2011

Managing Enrollments

Enrolling an individual into an available slot begins by viewing his or her waitlist entry. If the Waiver Slot Assignment Committee selects an individual who has not yet been placed on the waitlist, the individual must briefly be added to the urgent waitlist for ID Waiver enrollment to proceed. DS Waiver may move from either Waiting List, but must be entered as new WL.

NOTE: All Training Center enrollments must come from the NON-URGENT Waiting List.



From the waiting list entry screen, the CSB Submitter scrolls to the bottom and selects “Request Enrollment” to begin the enrollment process. ID Waiver individuals must be enrolled from the Urgent Waitlist. New DS Waiver, Facility Slots, Trust Fund, and MFP slots can be enrolled from the Non-Urgent list as an urgent reason is not necessary for enrolling into a Waiver.

The enrollment process includes: identifying information (DOB, Medicaid #, SSN, CSB#, WL Status), LOF results, ISP Dates, slot options, enrollment information and slot assignment. A partial request can be viewed below. (Medicaid and SNN # changes must be faxed to Vivian Stevenson 804-786-8626).

REQUEST INDIVIDUAL ENROLLMENT

Individual Record

Identifying Information

Name:	Doe, Jane
Gender:	Female
Birth Date:	12/4/1990
Race:	White

As part of the enrollment request process, a slot must be chosen from available CSB/BHA slots. To choose a slot, select “Choose Slot” and then select an appropriate slot type. Slot types include: ID Community, Facility, MFP, Children’s, Day Support, Trust Fund, and Loan. New MFP, Trust Fund Slots, and Facility Slots must be requested from ODS by the CSB Support Coordinator

by fax or phone call. Vivian Stevenson will assign the new slots to the CSB in the “available slot” cue, once requested.

Note: In the IDOLS system slots were given numbers to help manage the system of slot assignment by CSB/BHAs. Slots created prior to FY2010 will have random numbers and random slot years assigned to them. With the new numbering system, the previous slot assignment dates were not able to be maintained. The total number of slots by CSB remains the same. Beginning with FY2010 each slot has the accurate fiscal year and a number assigned to it. It no longer matters who had the slot previously by individual’s name. Only the slot number and year will be used. MFP, Facility, and Trust Fund slots are assigned to a person.

Slot

Slot: **Choose Slot**

Select Slot

Search

Slot Description	Slot Type	Slot Owner [CSB]	Individual	Allocation Year	Slot Status
Select ID Community_11__29	ID Community	BLUE RIDGE CSB		2011	Available
Select ID Community_11__31	ID Community	BLUE RIDGE CSB		2011	Available

Enrolling an Individual into an Available Slot

Submitters have only one option for “Status Reason”,
 -Enter today’s date for “Status Date
 -Enter today’s date also for “Enrollment Date”

Enrollment Information

Slot Information

Status Reason: Select one...
Status Date: 06/06/2011

Enrollment Date: 06/06/2011
Target Group: Select one...

6/13/11 66

After providing the date of enrollment, the status date and reason, choose the individual’s Target Group from the drop down menu. The following are possible options.

Enrollment Information

Slot Information

Status Reason: Select one...
Status Date: _/_/_

Enrollment Date: _/_/_
Target Group: Select one...



Select one...

- ICF/MR Applicant
- In community at risk of institutionalization
- Res of community based ICF/MR converted to waitlist
- Res to be discharged from community based ICF/MR
- Resident to be discharged from nursing facility
- State MH Hospital being discharged
- State Training Center being Discharged

Next the slot assignment information is entered. Enter the date the family was “offered” the slot and the date the slot was “accepted.” If the individual is enrolling into a Money Follows the Person slot (MFP), enter the date that the “MFP Request for Enrollment” form is sent to the Office of Developmental Services. The text box provides a location for any additional comments.

Slot Assignment

Offered Date:

Accepted Date:

MFP Requested Date:

Request Text:

Scroll to the bottom and select “Submit Enrollment Request” to process the enrollment.

Slot Assignment

Offered Date:

Accepted Date:



For Day Support Waiver slots only, select “yes” or “no” to indicate the individual’s choice to remain on the statewide waiting list for the ID Waiver and then select “Submit Enrollment Request.”

The screenshot shows a form titled "Remain on Waitlist". It contains a label "Leave individual on waitlist:" followed by a dropdown menu. The dropdown menu is open, showing options "Select one...", "Yes", and "No". A red arrow points to the "Yes" option. Below the form are two buttons: "Submit Enrollment Request" and "Cancel".

The CSB Enrollment Approver can access pending enrollment requests by selecting “Awaiting CSB Approval” from the IDOLS Navigation Pane.

The Enrollment Approver then selects the individual to process the approval or denial of the enrollment. Click on the “Awaiting CSB Approval” view to see the list of individuals waiting.

-
- Projected Waiver Enrollments
 - Waiver Enrollments on Hold
 - Awaiting CSB Approval
 - Denied By CSB
 - All Enrollment Records
- A red arrow points to the "Awaiting CSB Approval" option.

The screenshot shows the "Enrolling an Individual into an Available Slot" page. The page title is "Enrolling an Individual into an Available Slot". The page content includes a navigation pane on the left with options like "Manage Waitlist", "Manage Enrollments", and "Enrollments". The main content area shows a table of enrollments with columns for "Enrollment Description", "Slot", "Individual", and "Status Reason". A red arrow points to the "Awaiting CSB Approval" link in the navigation pane. Below the table, there is a search bar and a table header with columns: "Slot", "Individual", "Enrollment Status", "Status Date", and "Enrollment Date".

Approval provides three statuses available to the **Enrollment Approver**: Projected, Active and Hold.

“Projected” is chosen before services begin and the status date to enter is the projected start date. The projected start date should not be more than 60 days from the enrollment date. If it is longer or the Medicaid number is not yet available, then wait to enroll the individual 60 days or less from the projected date.



The screenshot shows a form titled "Slot Information" with the following fields:

- Status Reason: Projected (dropdown menu)
- Status Date: 06/15/2011 (text input)
- Enrollment Date: 06/03/2011 (text input)
- Target Group: Select one... (dropdown menu)

“Active” is chosen when waiver services begin and the status date entered is the date services started. Note that Approvers must go back and change the “Projected status” to Active if it was first entered as “Projected.” The enrollment date stays the same.



The screenshot shows a form titled "Slot Information" with the following fields:

- Status Reason: Active (dropdown menu)
- Status Date: 07/01/2011 (text input)
- Enrollment Date: 06/03/2011 (text input)
- Target Group: Select one... (dropdown menu)

“Hold” is chosen when services have been interrupted or delayed. The status date is the date services were interrupted.

Slot Information

Status Reason: Status Date:

Enrollment Date: Target Group:

The “Enrollment Date,” once entered, should NEVER be changed when changing the status

Note about loaned slots

Enrolling an Individual into an Available Slot

- Loan slots follow the same procedure as now and require negotiations with ODS
- Once a loan slot is approved, it will appear as a facility slot with the word Loan beside the slot number

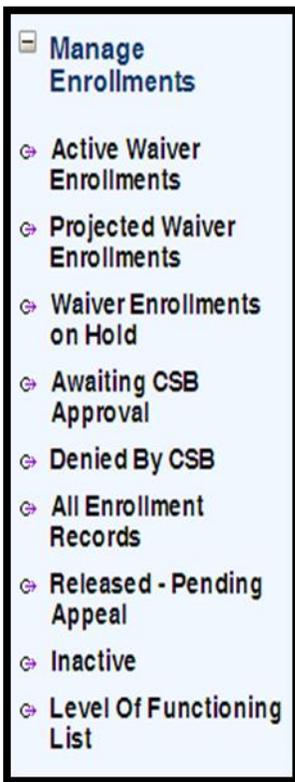
PROJECTED ENROLLMENTS - (2 TOTAL RECORDS)

Slot	Individual	Enrollment Status	Status Date	Enrollment Date
<input type="text" value="Children's_11_1"/>	Clinton, Knute	Projected	6/14/2011	5/27/2011
<input type="text" value="Facility_08_39_LOAN"/>	Hicupp, Wild Bill	Projected	5/2/2011	4/7/2011

2 Total Records

Level of Functioning List – Use the view the “LOF List” in left column regularly for identifying **Needed Updates**.

These must be updated annually for Active, Projected, and Hold waiver enrolled individuals and entered in the system.



Updating the Living Situation

The living situation is updated annually at the time the LOF is updated annually. If a person is moving from the Training Center into the community, the Living Situation selected should be the one they are moving into in the community.

Moving from the DS Waiver to the ID Waiver

Once the individual has accepted the new ID Waiver slot, they must be terminated from all services, the ID Waiver and the Waiting List. Print out the information from the WL and the Enrollment sections so that you can re-enter the information. Terminate the individual from the WL and end all services (the provider should end their own services), then “release the Waiver slot.” Complete a new WL record for the individual for the WL using the same information to the same Wait List from previous record. Next “request enrollment” and assign the ID Waiver slot given to the person. Re-assign new services for the ID Waiver to the providers who were providing services on the DS Waiver. Be sure to notify the provider and

have them terminate the DS Waiver services prior to releasing the slot. The new service start dates must coincide with the end service dates. If you have problems with this process call Vivian Stevenson at 804-786-9853.

Confirming Waiver Eligibility for DSS Financial Review

The bottom of every approved enrollment record contains the approval confirmation and the statement needed for DSS to proceed with determining financial eligibility for the ID and DS Waivers. This record should be printed and submitted to DSS along with the DMAS 225 to initiate financial reviews. Print the record by right clicking with the mouse and selecting print from the options provided. **This takes the place of the “Level of Care” form that was sent by ODS.**



Slot Assignment Approval

Approval Status:	<input type="text" value="Approved"/>	Submitted By:	cheri.stierer@dbhds.virginia.gov
Approved/ Denied By:	Stierer, Cheri	Submitted Date:	3/29/2011
Approved/ Denied Date:	6/16/2011		

Doe, Jane has met the level of care requirements for Medicaid waiver services and needs a Medicaid eligibility determination completed. **Doe, Jane** is authorized to have eligibility determined using the special institution rules.

“[Individual’s Name] has met the level of care requirements for Medicaid waiver services and needs Medicaid eligibility determination completed. [Individual’s Name] is authorized to have eligibility determined using the special institution rules.”

Removing an Individual from the ID Waiver Waiting Lists



To remove an individual from the ID Waiver Waiting Lists, the CSB Wait List Approver must first view their waiting list record and select the person’s name from the list.

WAITLIST BY CSB - NON-URGENT (2 TOTAL RECORDS)

Waitlist - Non-Urgent (2 Total Records)

	List Type	Status	Individual	SSN	Medicaid ID	Date Of Request	Date of Need	Last Contacted
<input type="button" value="Select"/>	Non-urgent	Non - Urgent Waitlist	Rider, Gail	111111111		5/29/2011	5/29/2011	5/29/2011
<input type="button" value="Select"/>	Non-urgent	Non - Urgent Waitlist	Thumb, Tom	111111111		5/29/2011	5/29/2011	5/29/2011

2 Total Records

After viewing the record, scroll to the bottom and select “Remove Individual from Waitlist.” Select the bar below:

Approval

Approval Status: Approved

Submitted By: _____

Approved/ Denied By: _____

Submitted Date: 4/1/2

Approved/ Denied Date: _____

[Edit Waitlist Record](#) [Remove Individual From Waitlist](#) [Request Enrollment](#)

Removal Reason

Removal Reason: [Download Blank Appeal Letter](#)

[Remove From Waitlist](#) [Cancel](#)

Select one...

- Deceased
- Did not complete the process
- Opened in Error
- Incomplete Waitlist Enrollment
- Moved into ICF/MR NH or out of State
- Moved to another Waiver
- No longer meets LOF criteria
- Not Eligible
- Refused Services
- Removed from Waitlist
- Change in Status

To view the removal go to **“Individuals by CSB”** to view the removal.

***Once an individual is removed from the waitlist, they must be entered again by the CSB or reactivated by ODS to be placed back on the waitlist. Contact the Data Coordinator (Vivian Stevenson) in ODS for reactivation.

Releasing an Individual from Waiver

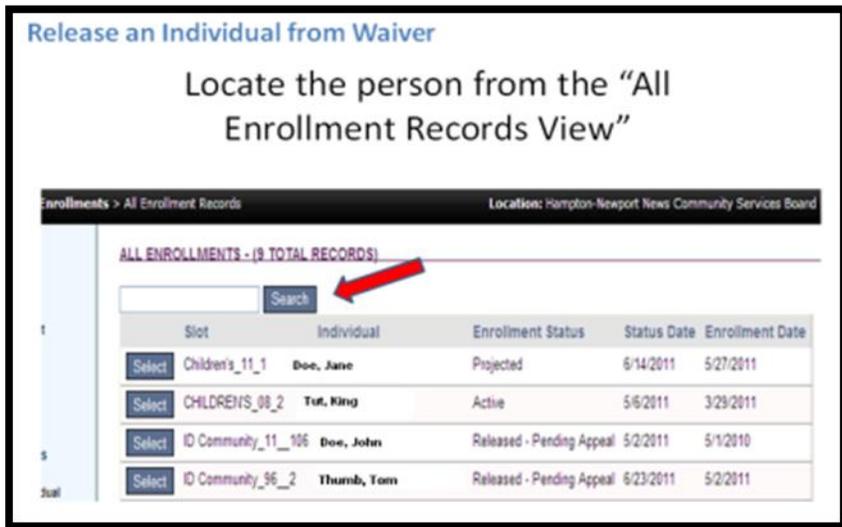
Manage Enrollments

- Active Waiver Enrollments
- Projected Waiver Enrollments
- Waiver Enrollments on Hold
- Awaiting CSB Approval
- Denied By CSB
- All Enrollment Records

The CSB Enrollment Approver must first locate the individual’s enrollment record by searching enrollments. Select **“Active Waiver Enrollments”** in the IDOLS Navigation Pane to access the search feature pictured below (see 1 and 2).



1



2

Complete a search and select the individual to display the enrollment record (see 3).



3

The Enrollment Approver can view the existing enrollment and then scroll to the bottom to select "Release from Waiver."

Slot Assignment Approval

Approval Status:

Submitted By: _____

Approved/Denied By: _____

Submitted Date: _____

Approved/Denied Date: _____

Once selected, the Enrollment Approver must choose from available reasons for release from the waiver before choosing if the release is “pending appeal” or is a “final release from waiver.”

Release an Individual from Waiver

- Select a reason and condition for release
- Select “Release Pending Appeal”

Removal Reason

Removal Reason: [Download Blank Appeal Letter](#)

Select one...

- Opened in Error
- Moved into another waiver
- Moved into ICF/MR/NH
- Moved out of State
- Refused Services
- Change in Status
- Deceased

Physical	3/7/2011	False	False
Psychologi			alse

Windows Internet Explorer

Are you sure you want to release this slot?

Removal Reason

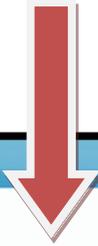
Removal Reason: [Download Blank Appeal Letter](#)

Assigning an Existing Slot

A vacant slot will become available for selection as an enrolled individual is released from a Waiver and vacates the slot.



If an individual's name shows up above under the **INDIVIDUAL** column, then the slot assignment is either pending CSB approval or waiting for an appeal exhaust date and should **NOT** be assigned.



Select Slot						
		Search				
	Slot Description	Slot Type	Slot Owner [CSB]	Individual	Allocation Year	Slot Status
Select	ID Community_11__29	ID Community	BLUE RIDGE CSB		2011	Available
Select	ID Community_11__31	ID Community	BLUE RIDGE CSB		2011	Available

Slot transfers between CSBs/BHAs **require written communication with ODS**. Typically, a copy of the transfer letter is sent to the Data Coordinator (Vivian Stevenson) and/or the Community Resource Manager (Cheri Stierer) in ODS. The Data Coordinator in ODS will then transfer the slot within the IDOLS system. Be certain to follow the Transfer Procedures for the ID Waiver as described in the MR/ID Community Services Manual.

Children's Slots from the 2007 allocation and any vacant slots will be monitored by ODS. Once released, Children's slots return to ODS for reassignment. In addition, any released MFP slot or Facility slot that has been active for less than 12 months should also go back to the state pool. The person from the CSB who is responsible for releasing/approving the release of a Facility or MFP slot in the Active status less than 12 months, should notify ODS (Vivian Stevenson) upon release.

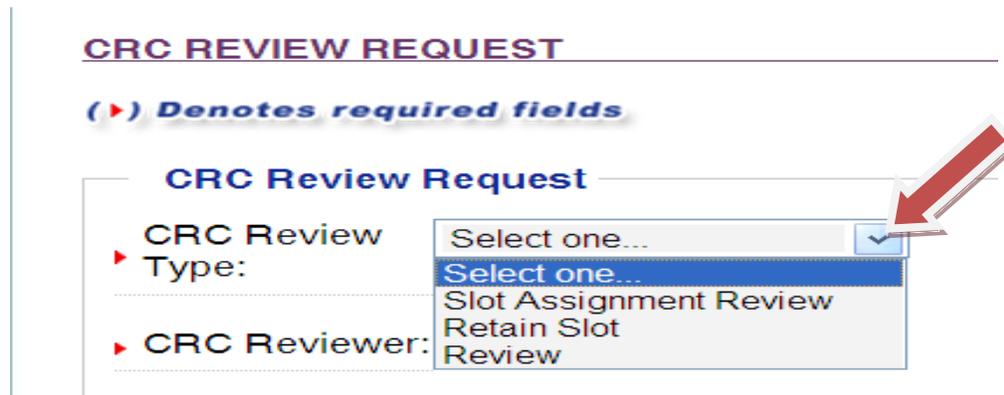
The Region 4 – H Slots require notification to ODS upon assignment, as well as release.

Submitting Slot Assignment Spreadsheets and Requests to Retain a Slot for CRC Review

The Enrollment Approver selects “Request CRC Review” from the IDOLS Navigation Pane.

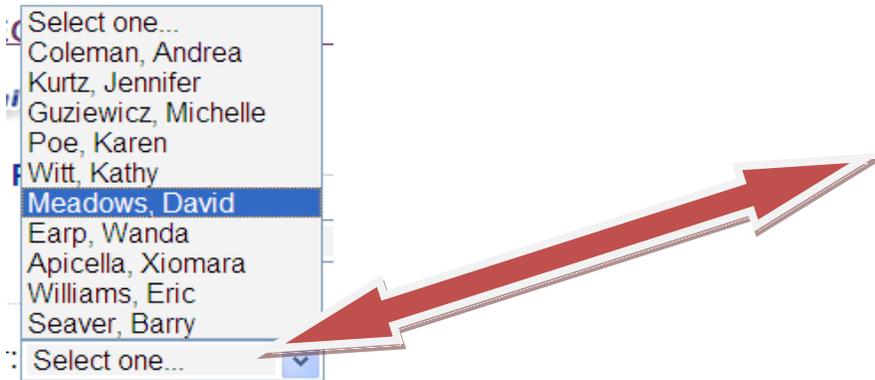


The Enrollment Approver can select one of three options. Option 1: Select the “Slot Assignment Review” option when submitting the results of the Waiver Slot Assignment Committee process. Option 2: Select the “Retain Slot” when services have been delayed or interrupted. Option 3: Select “Review” option which to submit documents securely to a CRC such as a psychological or an ISP.



The assigned Community Resource Consultant (CRC) is selected by name from the drop down “CRC Reviewer” list.

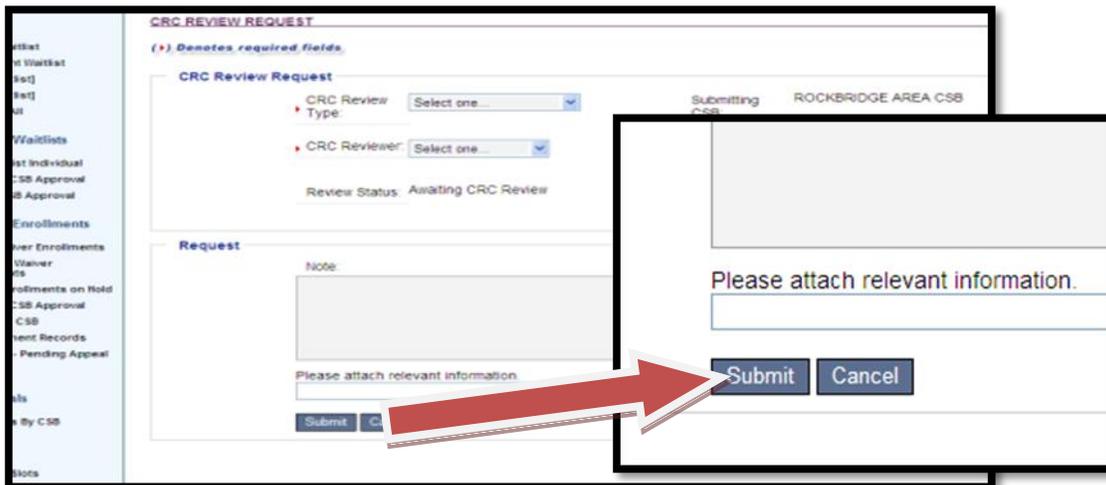




Then enter any communication and “attach” the Retain Slot form or WSAC spreadsheet from Microsoft Office by browsing your computer hard drive via the “Browse” button.



Scroll to the bottom and select “Submit” to ensure confidential communication with a CRC. The request will then be available to the assigned CRC for review. A generic email will be sent to the CRC and to the Enrollment Approver notifying that there is communication waiting.



Status of requests can be viewed by selecting “Reviewed/Accepted” or “Requires More Information.” NOTE: When a request is listed in “Requires More Information,” it will remain there in the view, even after the information is submitted.

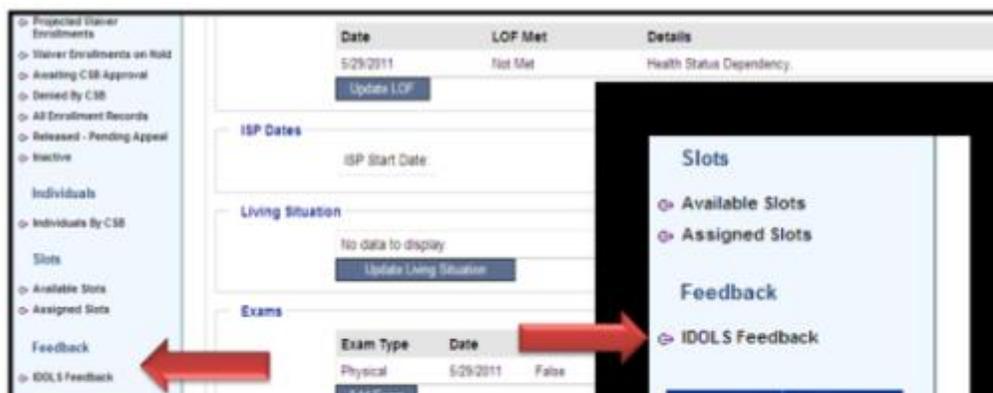
Once the email is received, check the appropriate list in the IDOLS Navigation Pane review the CRC response.



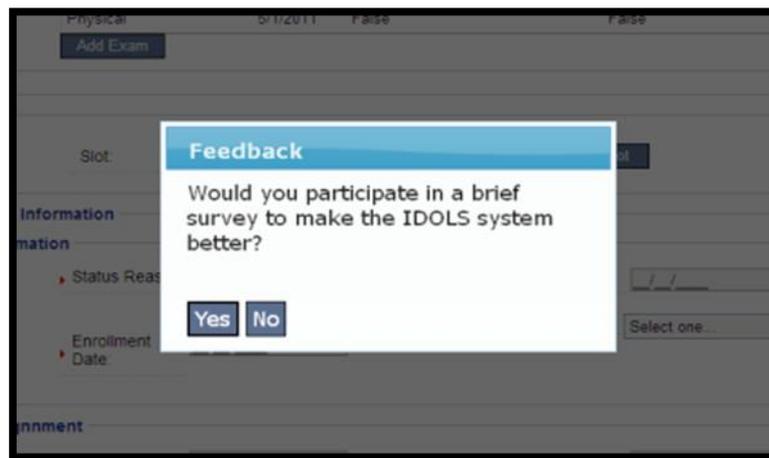
Providing Feedback Through the Online Survey



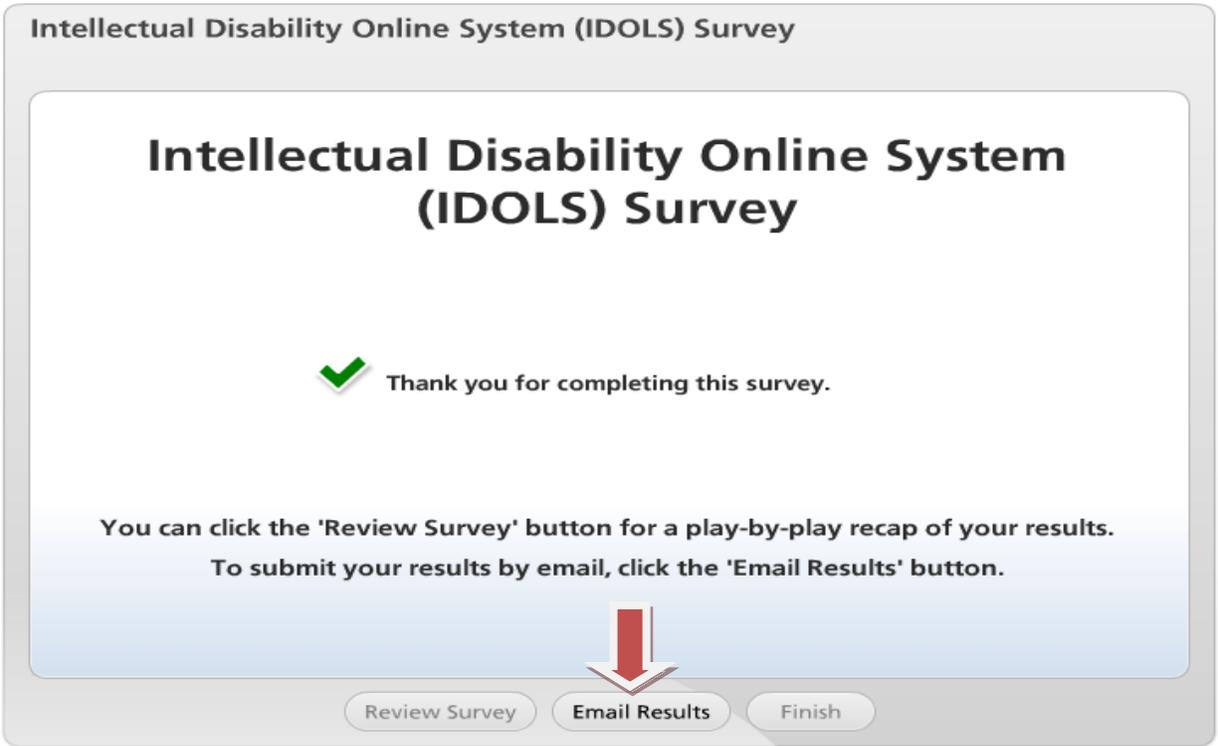
Selecting “IDOLS Feedback” in the IDOLS Navigation Pane provides the opportunity to offer feedback via the online survey.



Random pop-ups are also provided to provide the opportunity to take a brief survey and submit feedback by system email.



However you access the Survey, ODS appreciates your feedback in our continued efforts to improve the IDOLS system. Please be certain to select "Email Results" to submit your feedback to the DBHDS program administrators.



The “Finish” button will save and NOT send the feedback in the system. FINISH really means “finish later.” So use the “Email Results” button when ready to submit the completed survey.

Contact Information

DELTA Helpline: 804-371-4695

IDOLS Helpline: Local 804-371- 5208 or

1-855-234-3657 or 1-855-23 IDOLS

Hours M-F 8:00-4:00

Vivian Stevenson (804) 786-9853, Fax (804) 786-8626

Vivian.stevenson@dbhds.virginia.gov

Community Resource Consultants

<http://www.dbhds.virginia.gov/ODS-Contacts.htm>

Cheri Stierer, Community Resource Manager

Office (804) 786-0803

Fax (804) 692-0077

cheri.stierer@dbhds.virginia.gov