Department of Behavioral Health and Developmental Services

Virginia

Waiver Management System

CSB Navigation Manual

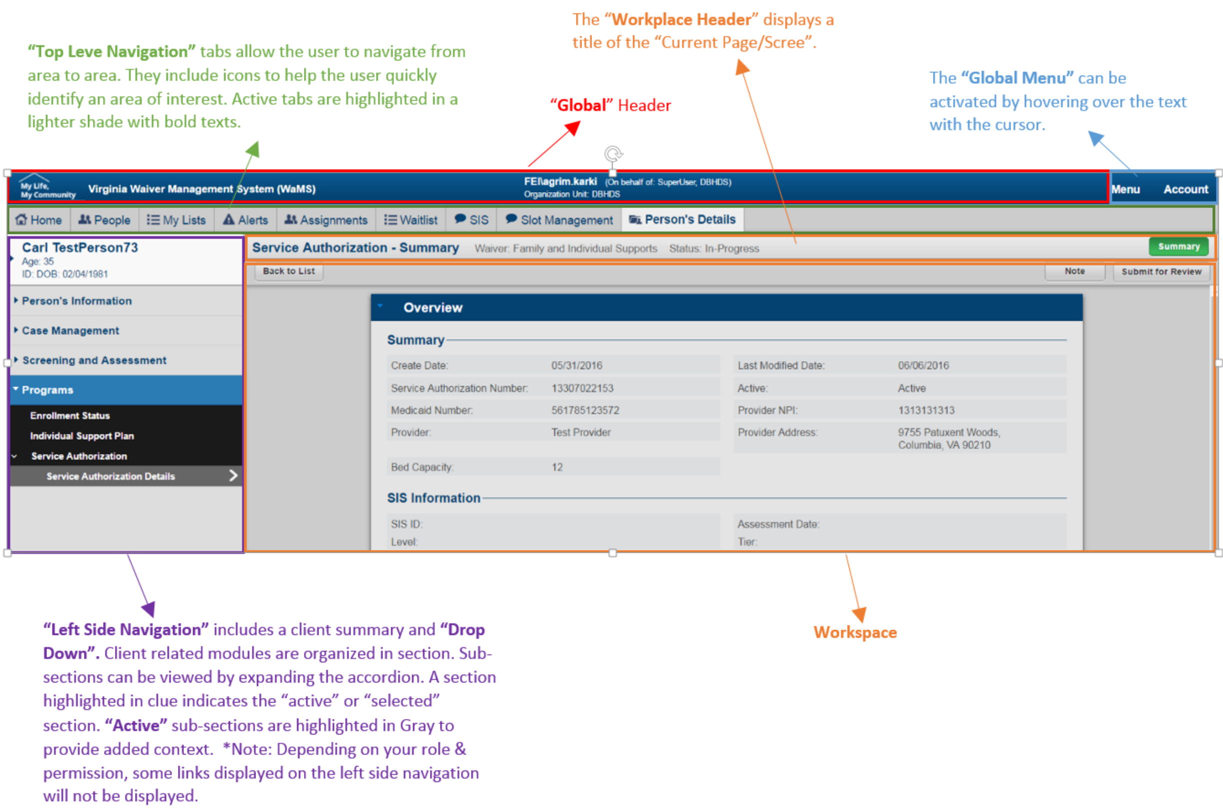
August 22, 2016

Waiver Management System

Contents

1 WaMS Navigation

The image below provides an overview of the standard layout of WaMS VA screens. It provides a quick description of the different elements on the screen and their significance. This can be a guide to navigate quickly through the system. For new WaMS users, it would be helpful to print a copy of this screenshot and place it close to your workstation. *Note: The navigation screen title bar, menu, tabs (both across the top and on the left), fields, information and messages vary according to role and permissions.



2 System-wide Controls

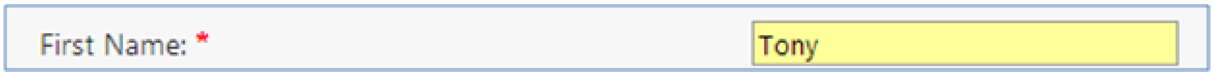
2.1 Input Fields

Entering data in various forms across WaMS uses one of the following mechanisms:

2.1.1 Text Boxes

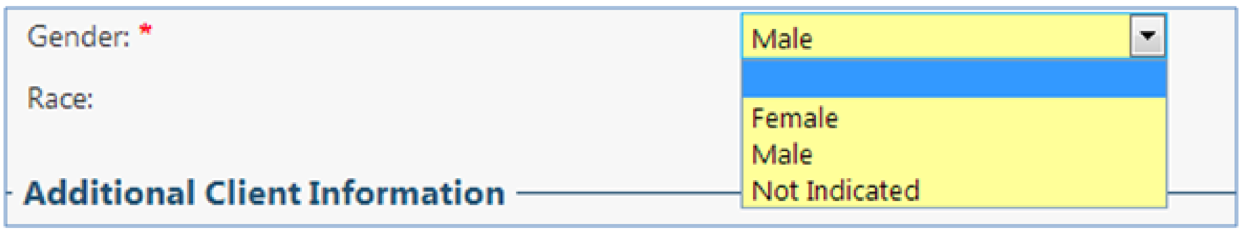
Text boxes are used whenever free text or values must be entered. To enter text into a text box, click on the text box and begin typing.

Note: Some input fields are required and are highlighted in yellow with one red star by the associated field label.



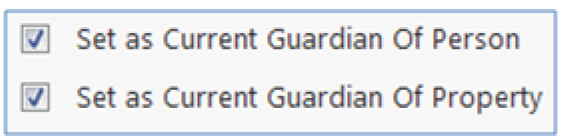
2.1.2 Drop-down Lists / Combo Boxes

Drop-down lists / Combo boxes are used whenever there is a list of options to choose from. To use a combo box, simply click on the arrow located to the far right of the combo box. A drop-down menu will appear. To select the response, simply click on the item from the listing.



2.1.3 Check Boxes

Check boxes are used to select one or more options from a list of available options. To activate the check box, click on the box next to the desired option or options.



2.1.4 Radio Buttons

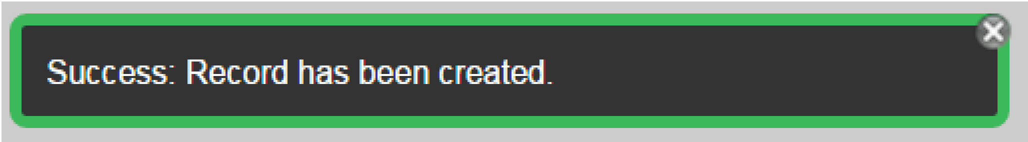
Radio buttons are used to select one option from a list of available options. To activate the radio button, click on the round button next to the desired option.

2.2 Messages

There are several messages notification for the users throughout the WaMS system. The primary purpose of the notification is to let the users know what the system has recorded or if any updates are needed to input any missing information.

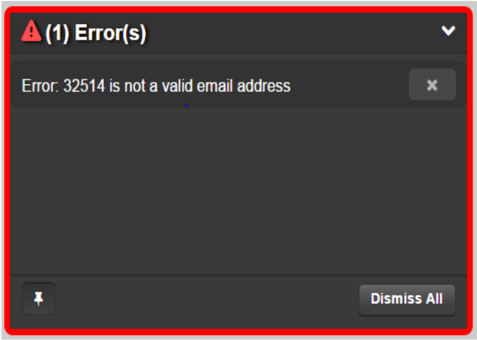
2.2.1 Success Messages

This notification indicates the system successfully processed the information and is outlined in green.



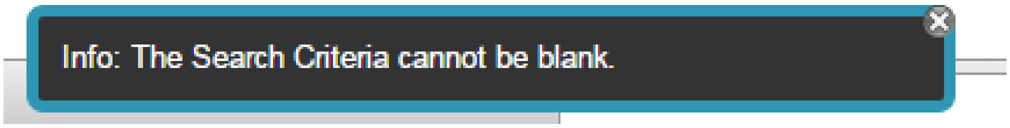
2.2.2 Error Messages

This notification indicates information is missing or more information is needed to proceed to the next task and is outlined in red.



2.2.3 Information messages

This notification provides high level overview information and is outlined in blue.

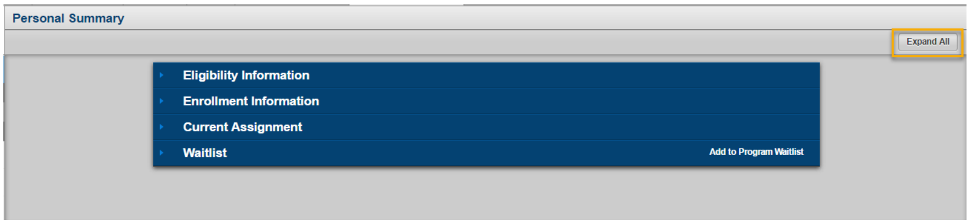


2.3 Buttons and Links

There are several buttons throughout the WaMS system. The buttons or links on the top right of the workspace take the user forward. The action buttons or links that take user back to previous screen are mostly on the top left of the workspace.

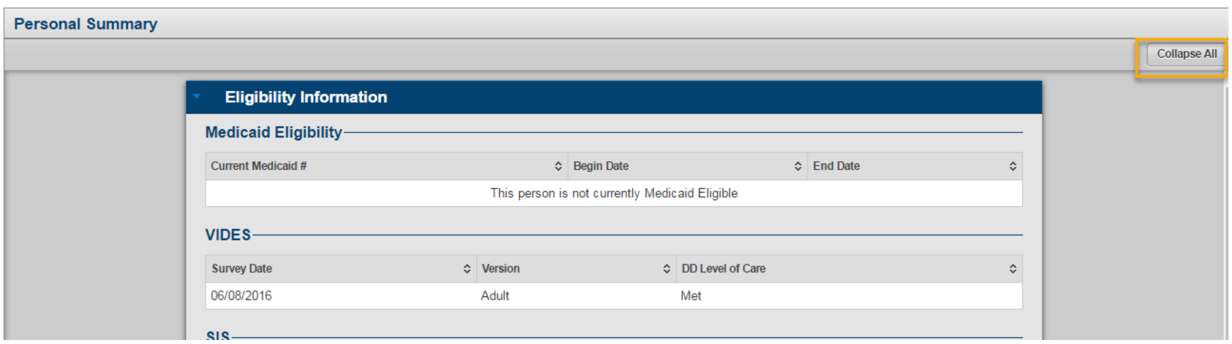
2.3.1 Expand All Button

This button expands all panels displayed on the current form (typically for a long form).



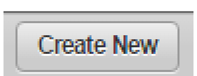
2.3.2 Collapse All Button

This button collapses all panels displayed on the current form or on the task list.



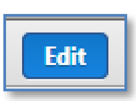
2.3.3 Create New Button

This button allows users to create a new form. There will be times (Enrollment Status, CSB assignment) when the only option will be to create a new form rather than edit the current form.



2.3.4 Edit Button

This button allows users to edit the form available in the main workspace. Edit is only available for certain forms.

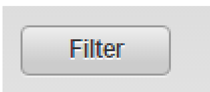


2.3.5 Search Buttons

This button allows users to initiates a search based on the criteria entered.

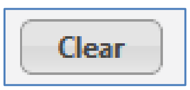
2.3.6 Filter Buttons

This button allows users to filter search results based on the criteria entered.



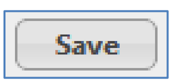
2.3.7 Clear Button

This button allows users to clear the search criteria previously entered.



2.3.8 Save Button

This button allows user to save the information entered and returns to the previous page. In most instances, the form remains editable in a saved state. As mentioned above, all the light-yellow fields (fields with one red star) need to be filled out in order to save a form.



2.3.9 Discard Button

This button allows users to discard a form that was saved or submitted.

2.3.10 Submit Button

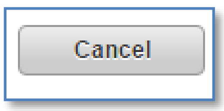
This button allows users to submit the information. Once submitted the form will no longer be editable. Alerts to other agencies/users within WaMS may be generated at that time.

2.3.11 Back to List/Back to Summary Link

This link allows the user to go back to the previous list or summary screen when the current form does not have a cancel action (e.g. Task list)

2.3.12 Cancel Button

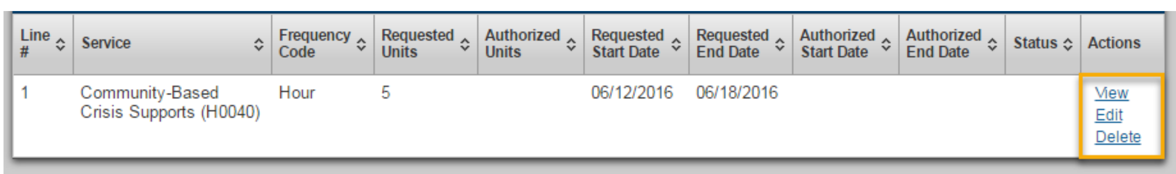
This link allows the user to cancel the current data entry and takes the user to the previous page without saving the information entered



2.4 Links

2.4.1 Table Links

These links allows users to take an action specific to the record displayed on the list. These actions usually depend on the current workflow status of the record.



Line #	Service	Frequency Code	Requested Units	Authorized Units	Requested Start Date	Requested End Date	Authorized Start Date	Authorized End Date	Status	Actions
1	Community-Based Crisis Supports (H0040)	Hour	5		06/12/2016	06/18/2016				View Edit Delete

3 Login

3.1 How to Login

Purpose of This Function

Users must login to WaMS prior to having access.

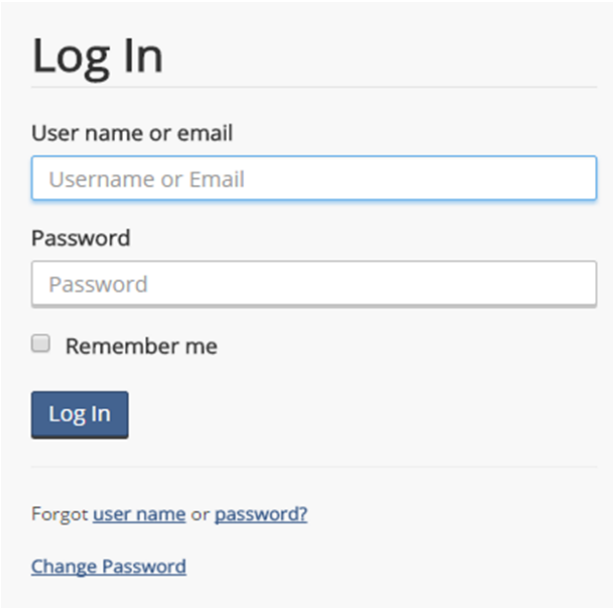
Who Can Use This Function

Any user of WaMS

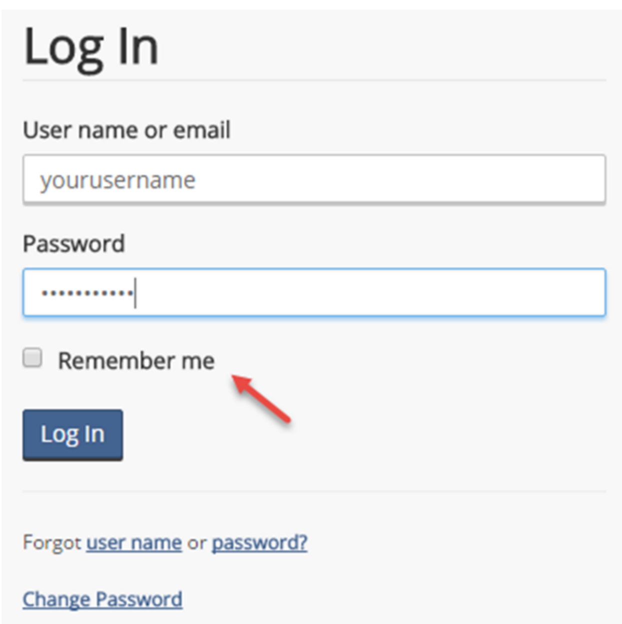
How to Use This Function

1. Go to https://www.wamsvirginia.org

2. Unless the user is already logged in, the user will see the main Login Page that asks for both the Username/Email and the Password



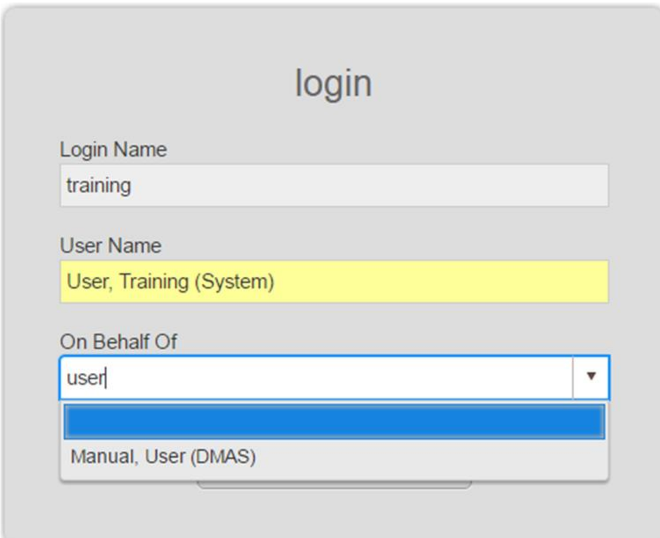
3. Enter the assigned Username or Email Address into the first field labelled 'User name or email'
4. Enter the chosen Password in the password field
5. The option to Remember Me will allow the user's information to be saved on this browser for later use, if desired



6. Click Log In to proceed

Please Note: If the user only has the power to login as themselves with one role, then WaMS will automatically log into the system, and the next steps will not be necessary.

7. User will be taken to the Authorization page.
    a. Users who do have at least one delegation in their Staff Profile:
        i. Enter staff name that the user is delegating in as in On Behalf Of field or leave blank to login as user
        ii. Click Login



Tips:

- If an error is received regarding ‘Invalid username or password’, verify that the information has been entered correctly.
- When the user logs on for the first time, a password will need to be created. See: Forgot/Create Password instructions.
- To setup delegations, see: Edit Staff Profile instructions.

3.2 Create New Password/Reset Forgotten Password

Purpose of This Function

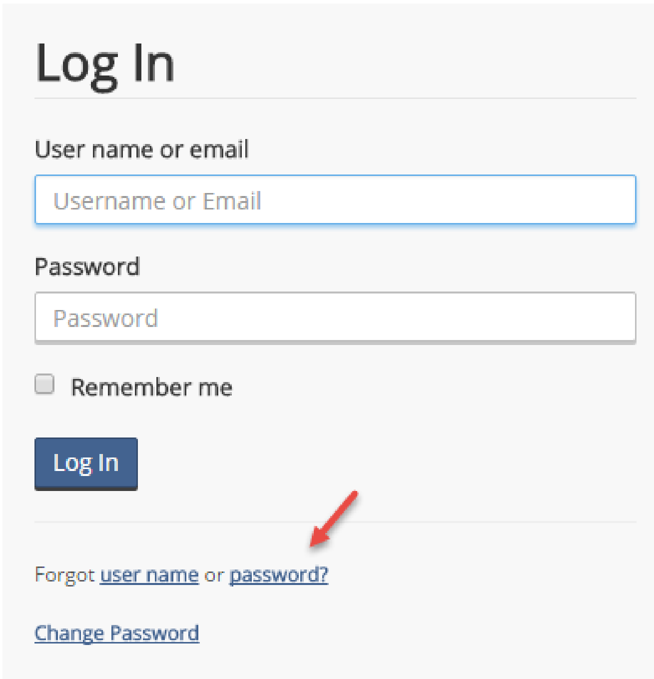
Creating a new password without having to enter the old password.

Who Can Use This Function

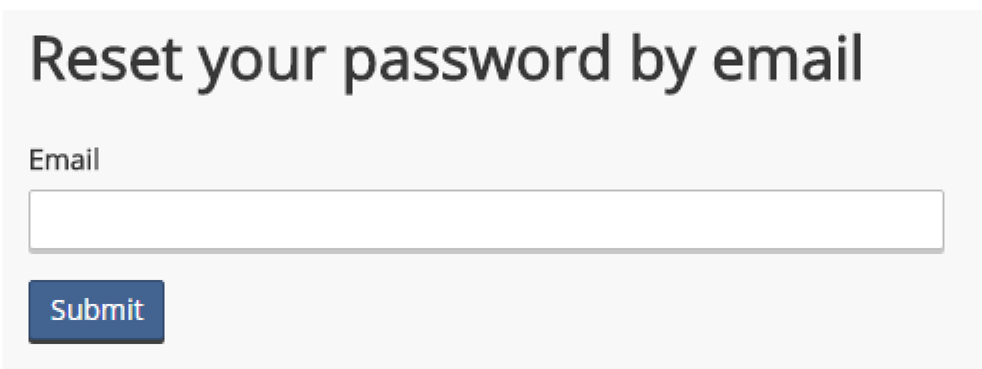
Any user of WaMS

How to Use This Function

1. On the Login screen, under the Login button, click the underlined word Password in the question: Forgot user name or Password?



2. Enter the email address
3. Click Submit



4. After successful submission, a unique link will be sent to the email address entered that will allow the user to create a new password

Tips:

- If the 'Invalid email address!' error is received, verify the email address entered is the one associated with this user's WaMS account.
- The Help Desk is available between 7am – 7pm EST if the user account is locked as it will need to be unlocked.
- Forgot Password Form should only be submitted once, if submitted twice, click the most recent email as the previous email link will no longer be valid.
- If the Reset Password email is not received within 10 minutes, check the spam folder of the email address it was sent to.

3.3 Change Password

Purpose of This Function

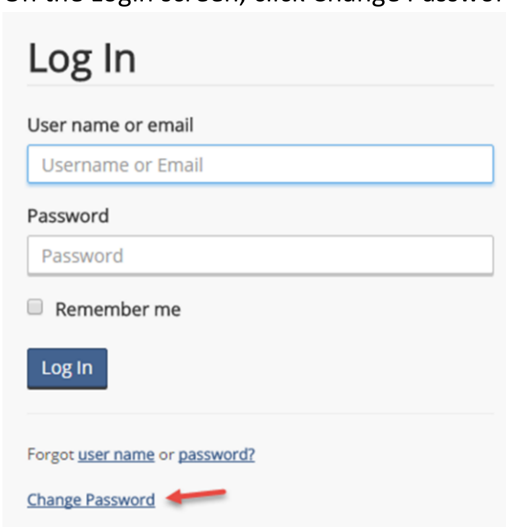
Change the password associated with username from one password to another.

Who Can Use This Function

Any user of WaMS

How to Use This Function

1. On the Login screen, click Change Password at the bottom.

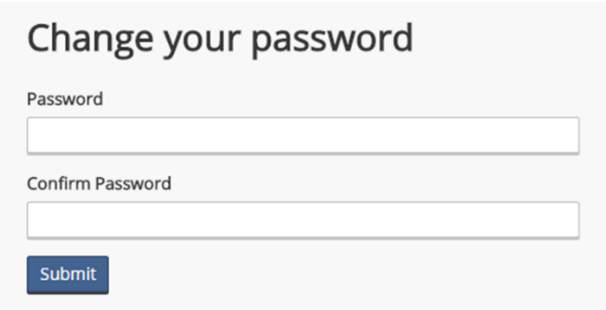


2. The user will be taken to a new screen labelled Change Password
3. In appropriate boxes, enter Username, Old Password, Password (new), and Confirm Password.

4. Click Submit

Tip:

- All passwords must be at least 8 characters and include 3 of the following character types: lowercase, uppercase, number, or special character



3.4 Forgot Username

Purpose of This Function

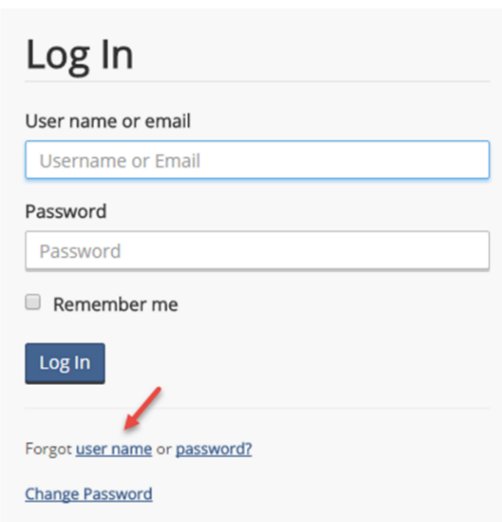
Email a forgotten Username to the user

Who Can Use This Function

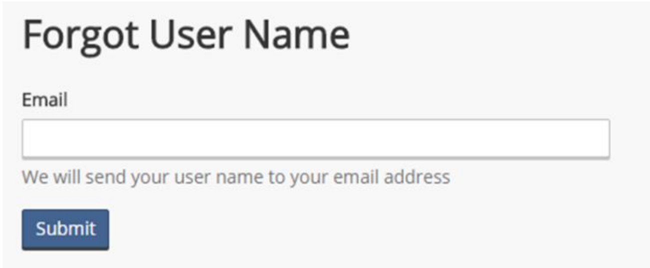
Any user of WaMS

How to Use This Function

1. On the Login screen, under the Login button, click the underlined words User name in the question: Forgot user name or Password?



2. User will be directed to a new page labelled Forgot User Name

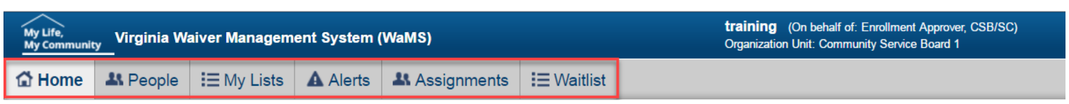


3. Enter Email Address associated with WaMS login
4. Click Submit
5. After successful submission, the username will be emailed to the email address entered

Tip:
- If an error message appears for 'Invalid email address', verify the email address entered is the one associated with this user's WaMS account

4 WaMS Top-Level Navigation

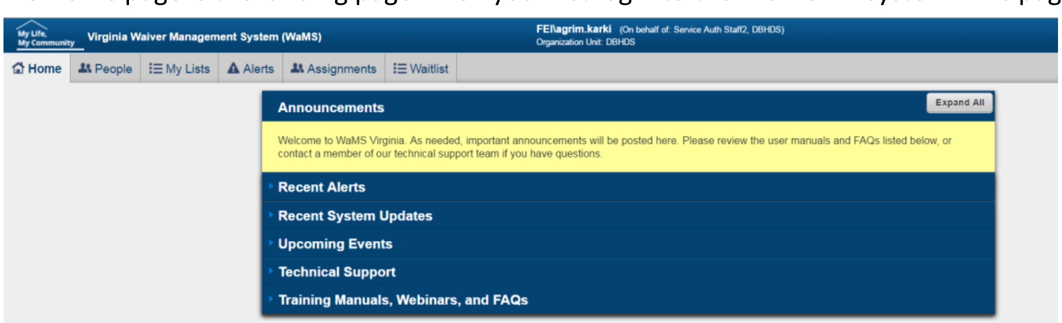
The top-level navigation is useful for high-level navigation through the system. The following tabs are included in the top-level navigation: Home, People, My Lists, Alerts, Assignments, Waitlist and Person Details.



Each of these tabs is described in detail below.

4.1 WaMS Home

The Home page is the landing page when you first login to the WaMS VA system. This page provides all the tools and materials necessary to use the system with ease.



The Home tab consists of the following sections:

4.1.1 Announcements

This section will provide the users important announcements as needed

4.1.2 Recent Alerts

This section describes systems alerts for WaMS

4.1.3 Recent System Updates

This section will display announcements regarding WaMS system enhancement based on user requirements

4.1.4 Upcoming Events

This section will display information about any upcoming events that agencies may want to attend. For example, information about in-person WaMS system trainings or training webinars will appear here

4.1.5 Technical Support

This section will contain contact information, such as the helpline number, for technical support.

4.1.6 Training Manuals, Webinars, and FAQs

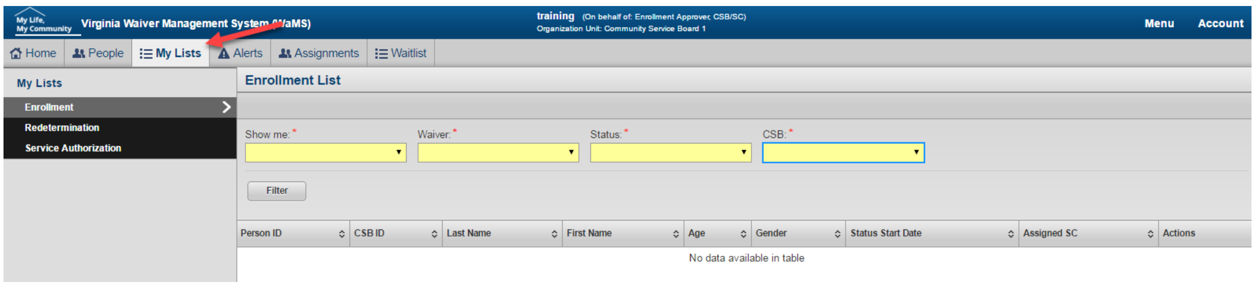
This section provides abundant detailed instructional materials, guides, presentations and video recordings on how to use the WaMS system. Materials will include user manuals (as mentioned in the introduction), recordings of webinars provided by topic (if applicable), and detailed additional information about various modules across the systems.

4.2 People

Since WaMS is a people-centered system, this is the go-to tab for any information about persons receiving services, regardless of the Medicaid program they are interested in applying for or are enrolled in.

4.3 My Lists

My Lists tab allows users to search for a subset of persons based on a certain criteria or category as defined in the drop-down list. For example, users can view a list of all persons with types of Enrollment, Individual Support Plan status and Service Authorization status. The lists are available strictly based on the agency and role of the user logged in.

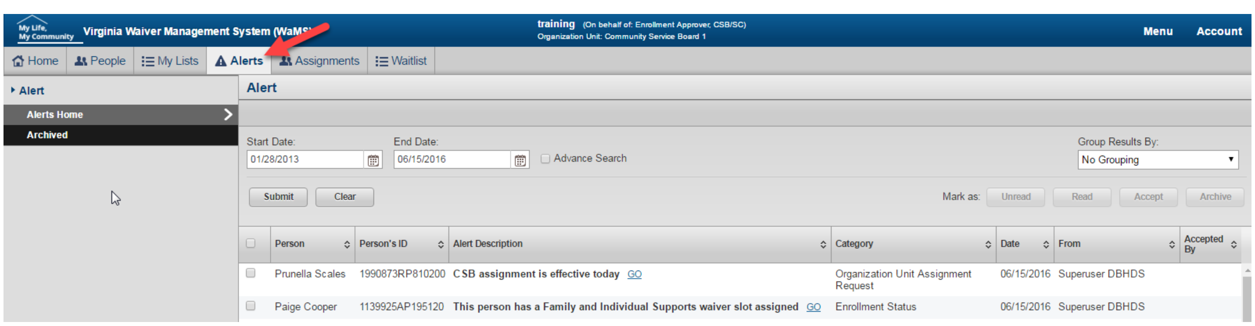


How to Use This Function

1. After clicking on the My Lists tab, select the types of program lists under the My List from the left side navigation
2. After selecting the program, click on the highlighted yellow drop-down menu and select a specific list
3. Then click on the Filter button to display the list

4.4 Alerts

The Alerts tab allows users to view and accept notifications from the different users in the system. Alerts inform the recipient that some type of action is required or has been completed. Alerts are specific to the logged-in user's role and assignments to specific tasks.



How to Use This Function

1. After clicking on the Alert tab, all alerts will appear chronologically, with the most recent alert appearing first. The user can sort alerts by Person's Name, Date, and Category

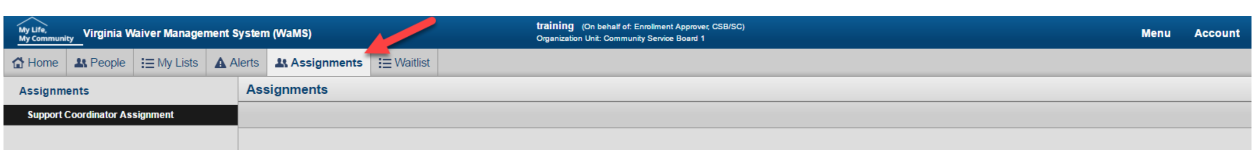
2. Selecting GO will open a new tab for the user to display the applicable page with more information about the alert

Tip:
• Emails received from Alerts will not contain PHI or PII data

Alerts
All members of the CSB:
1. CSB assignment is effective today 2. CSB assignment has been deactivated 3. CSB assignment has been created effective (date) 4. CSB transfer has been initiated. The current assignment will expire on (Date) 5. Slot has been released (if person was not assigned a SC) 6. Annual ISP for a person is due on (due date)
Support Coordinator Assigned to a Person:
1. You're no longer the assigned CSB support coordinator for this person 2. You have been assigned as CSB support coordinator 3. An enrollment status has been held 4. An enrollment status has been activated 5. This person has a (program name) waiver slot assigned 6. A Form note has been created (for ISP) 7. Attachment has been added to Individual Support Plan 8. Attachment has been removed from Individual Support Plan 9. There is an error related to a Service Authorization 10. The Status Code for Service Authorization has been updated. (triggered by PA staff) 11. The Status Code for Service Authorization has been updated (triggered by MMIS) 12. A new note has been added to the Service Authorization record 13. Annual ISP for a person is due on (due date) 14. The person's assigned waiver slot (Slot Number) is released

4.5 Assignments

The Assignments tab allows authorized users to assign or reassign staff within their agency to a person.

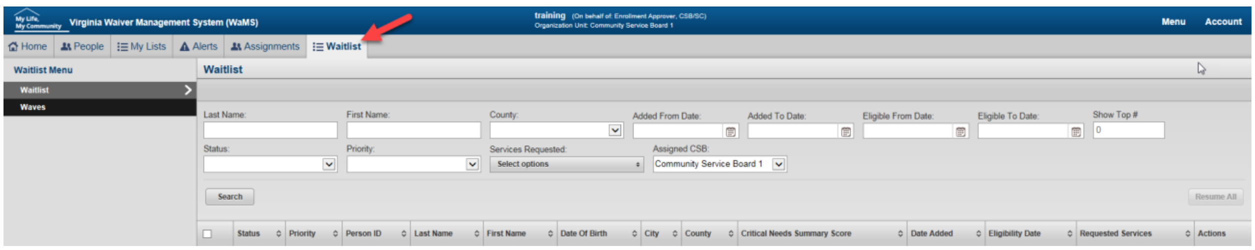


Tip:

- The only information a CSB can access on a person who is *not* assigned to them is Personal Summary, Personal Profile and CSB Assignment.

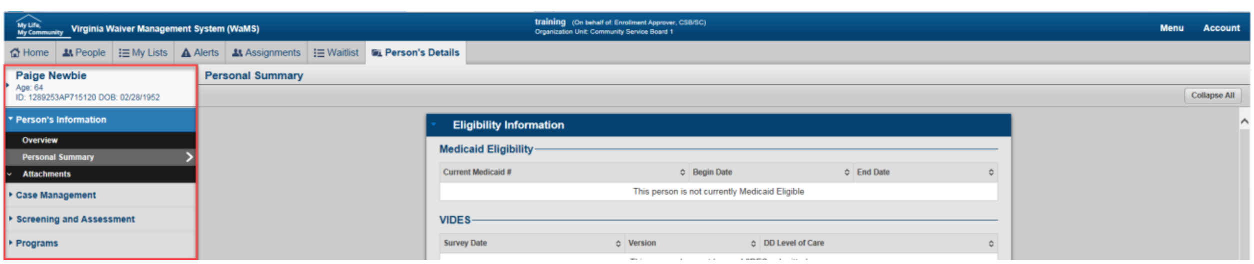
4.6 Waitlist

The Waitlist tab allows users to view the individuals/beneficiaries who are eligible under the waiver program but are in waiting list to get enrolled in a particular waiver. CSBs are only able to view persons assigned to their CSB who are on the waitlist.



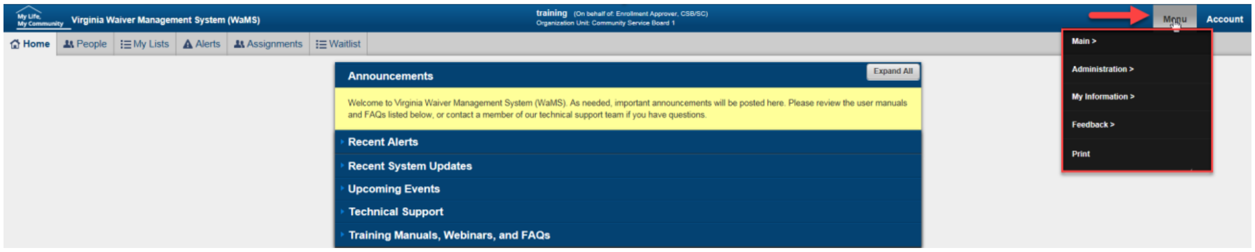
5 WaMS Left Side Navigation

The left side navigation is used most frequently to navigate through various forms, after selecting top level navigation tab. The list of available menu items depends on the logged-in user's role as well as the current module/function being displayed. The menu item currently selected will be highlighted with an arrow displayed on the right.



6 Global Menu

This menu functionality is related more to global system functionality than to individual or program related activities.



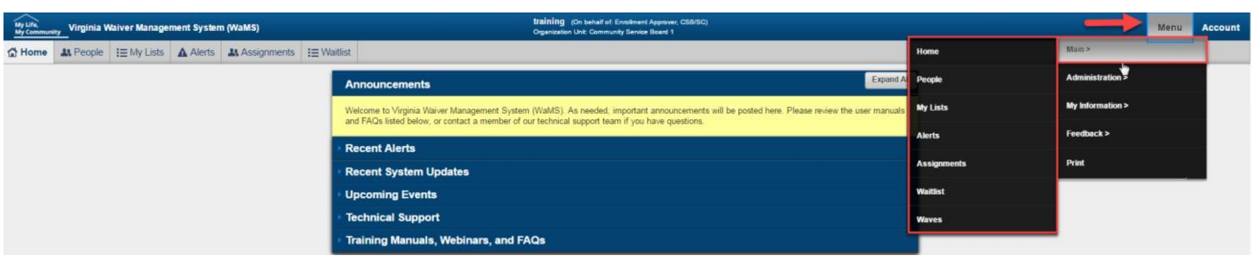
Global Menu has the following options. Any of the menu options with a rightward pointing arrow is in turn another menu. The menu options are available strictly based on the agency and role of the user logged in.

- Main
- Administration
- My Information
- Feedback
- Print

Each of these options is explained below in detail.

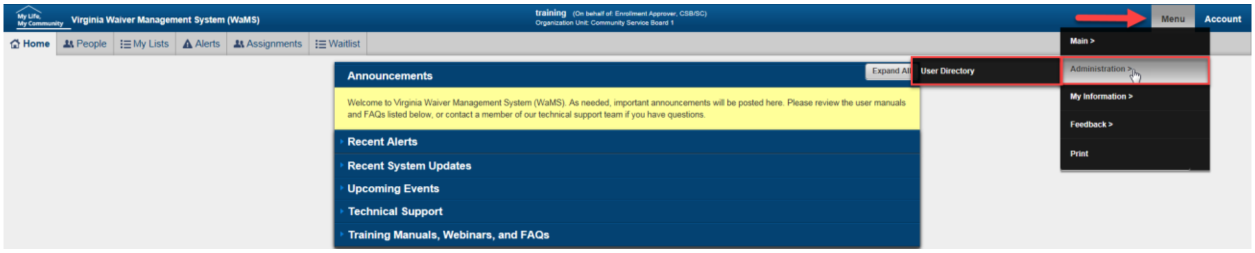
6.1 Main

Click on Menu, then click on Main to see the Main sub-options. The Main sub-options are the same as the top-level navigation tabs, discussed in the sections above.



6.2 Administration

Click on Menu, then click on Administration to see the Administration sub-options. (See: Administration)

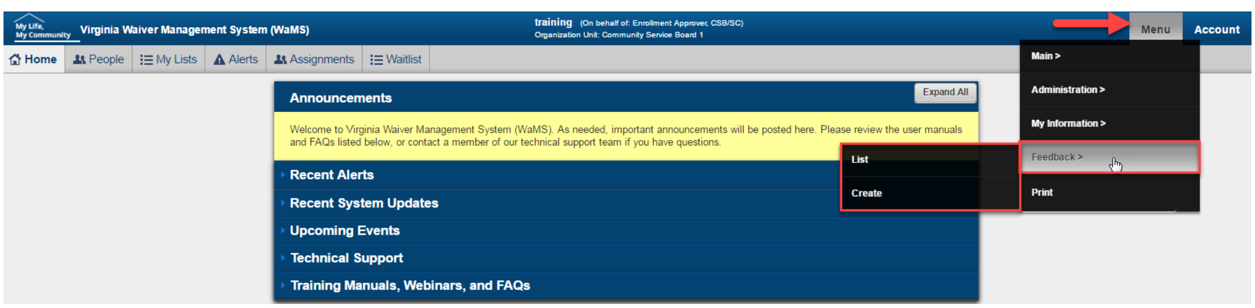


6.3 My Information

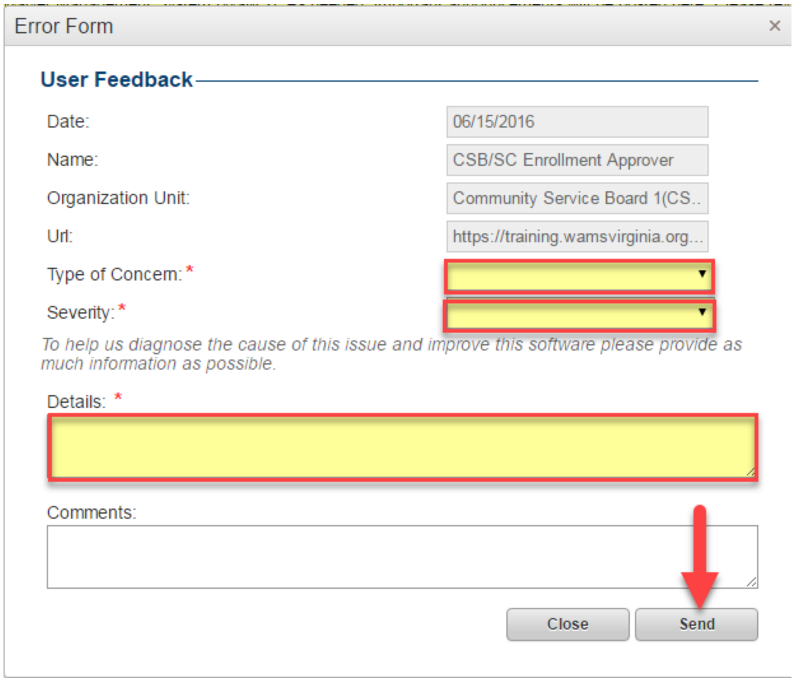
Click on Menu, then click on My Information to see the information on the user. (See: My Information)

6.4 Feedback

Click on Menu, then click on Feedback to see the Feedback sub-options. System errors or concerns can be reported and tracked via this Feedback link.



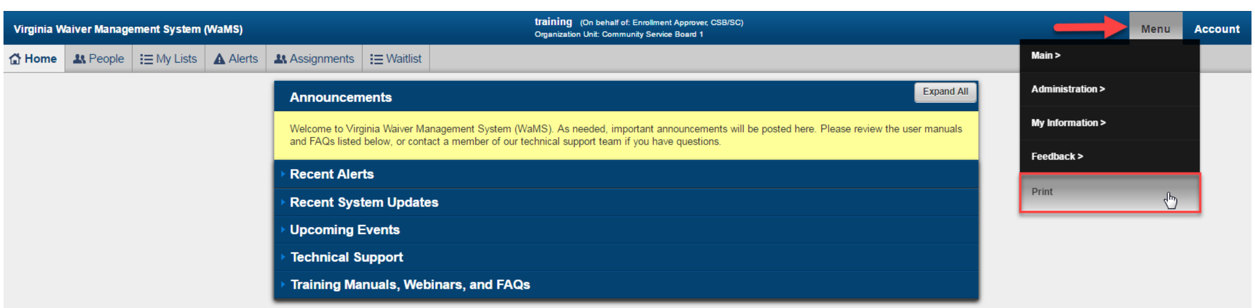
To enter feedback, select Create; the following popup will appear:



The link is automatically populated based on the user's current screen. Filling out the information and then clicking Send will automatically send the issue/concern to the Help Desk

6.5 Print

Click on Menu, then click on Print to print the current form with the standard print output. (See: Global Print)



7 User Directory

Purpose of This Function

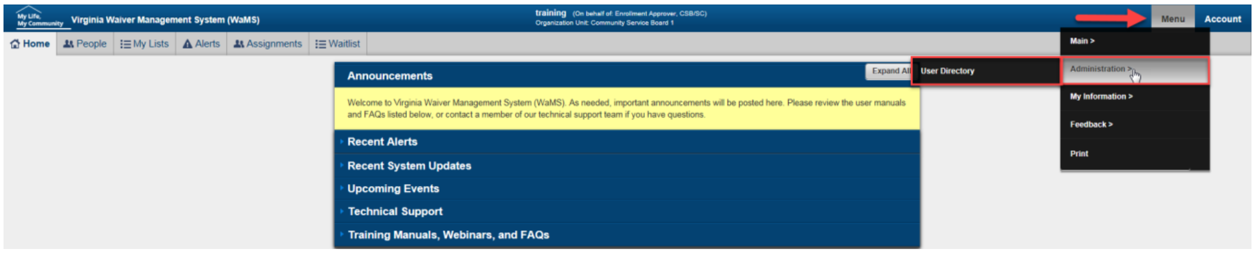
Search for and obtain information on any user in WaMS.

Who Can Use This Function

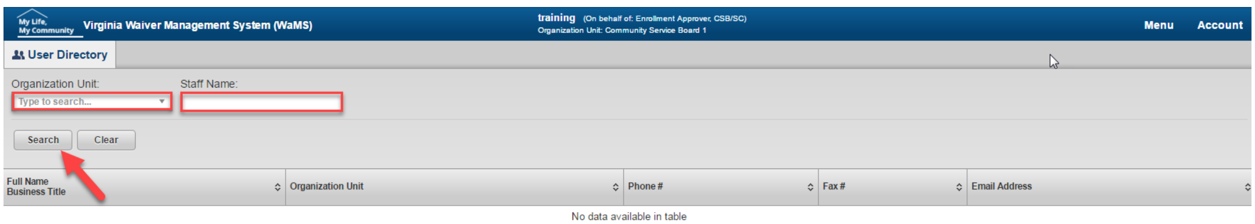
Any WaMS user

How to Use This Function

1. In the Menu file, open the Administration tab and open the User Directory



2. Enter information into the Organization Unit and/or Staff Name fields and click Search



3. Information can be sorted by Full Name, Organization Unit, Phone #, Fax# or Email Address

8 My Information

8.1 My Organization

Purpose of This Function

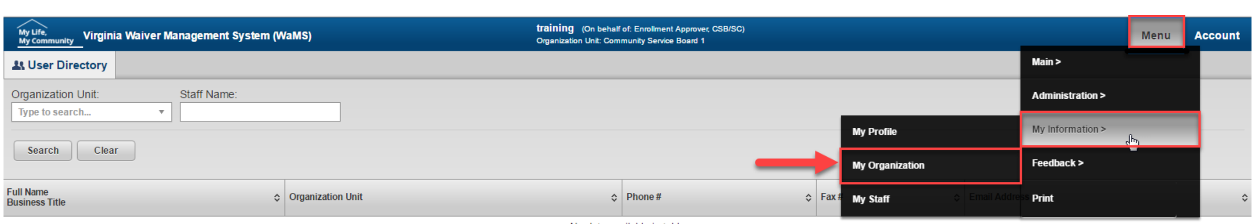
For the user to view the attributes of their organization

Who can Use This Function?

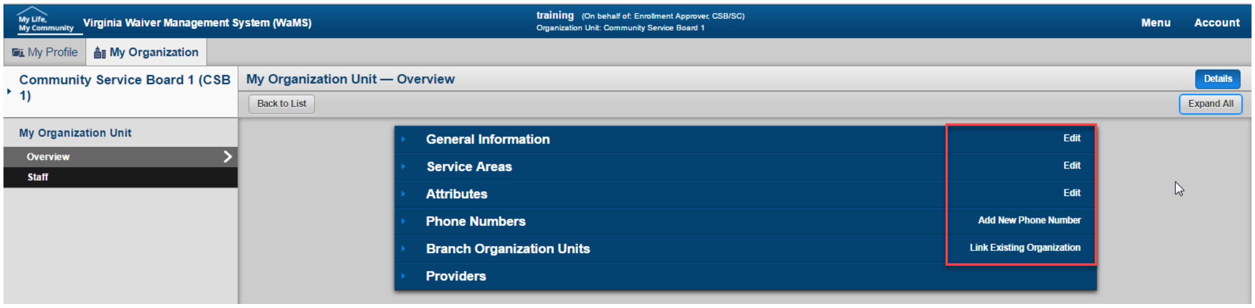
Any WaMS User

How to Use This Function

1. In the Menu file, open the My Organization tab



2. Update the organizations information as needed



8.2 My Staff

Purpose of This Function

Locate existing staff and create new staff in the organization.

Who can Use This Function?

Any WaMS User

How to Use This Function

1. In the Menu file, open the My Staff Search tab

2. Update the staff information as needed or create new staff.

8.3 Create Staff

Purpose of This Function

Add Staff Profiles for new users of WaMS

Who Can Use This Function

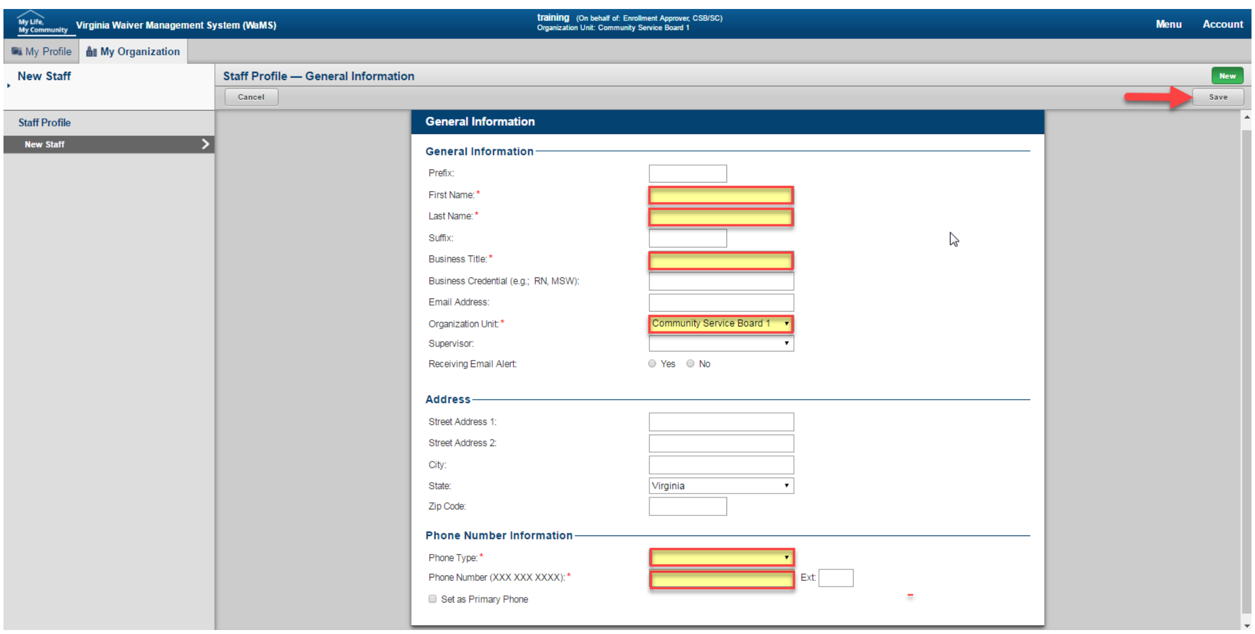
Any WaMS user

How to Use This Function

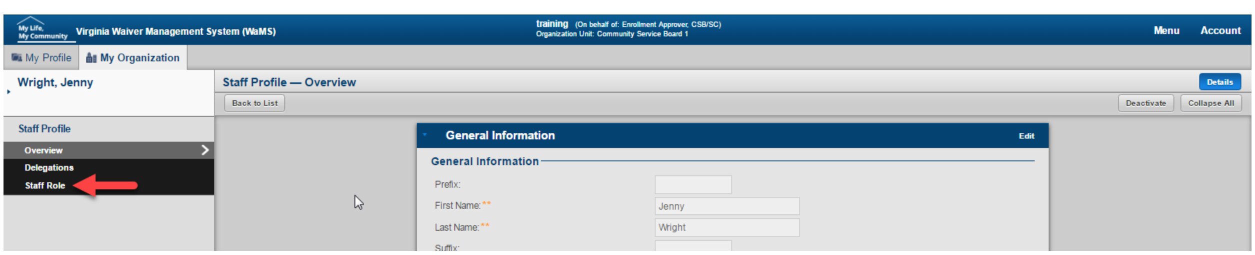
1. Navigate to the My Staff listing (See: My Information)

2. Click Create Staff on the right

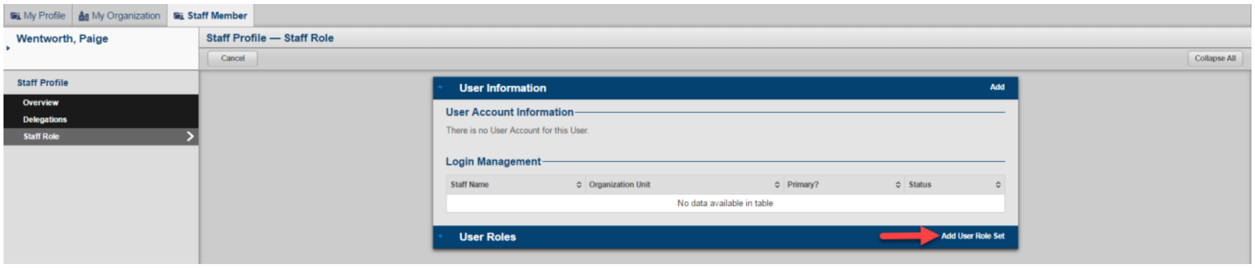
3. Complete required fields in the Staff Information
   a. Complete optional fields with known information
4. Click Save to generate Staff Profile



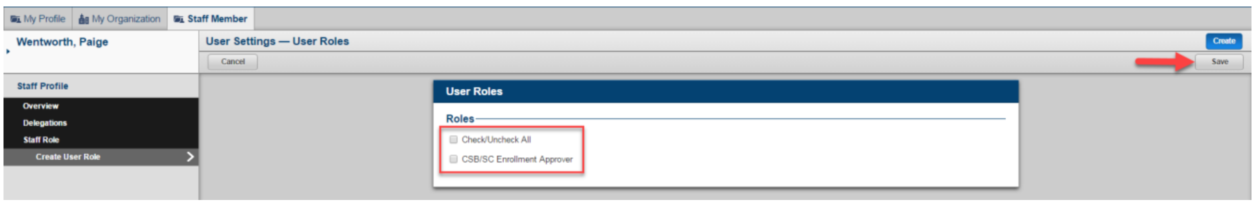
5. On the Left Navigation, click Staff Role



6. Click Add User Role Set



7. Select the appropriate role(s) for this New Staff



Tip:

- All Staff Profiles must have at least one User Role set in order for that Staff to use WaMS

8. Click Save

8.4 Edit Staff

Purpose of This Function

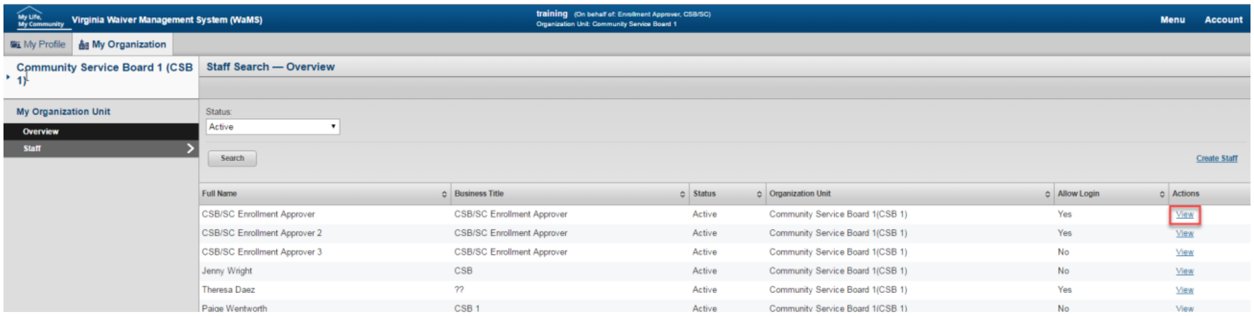
Update Staff Profiles for existing users of WaMS

Who Can Use This Function

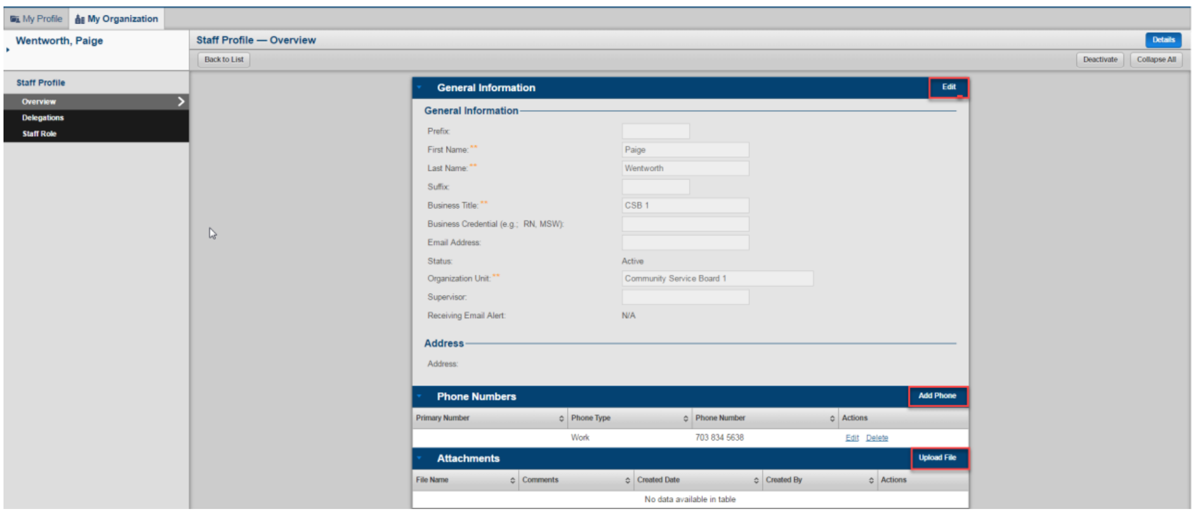
DBHDS, DMAS, CSB, Provider

How to Use This Function

1. Navigate to the Staff Profile (See: Menu -> My Information -> My Staff)
2. Click View for the appropriate staff member

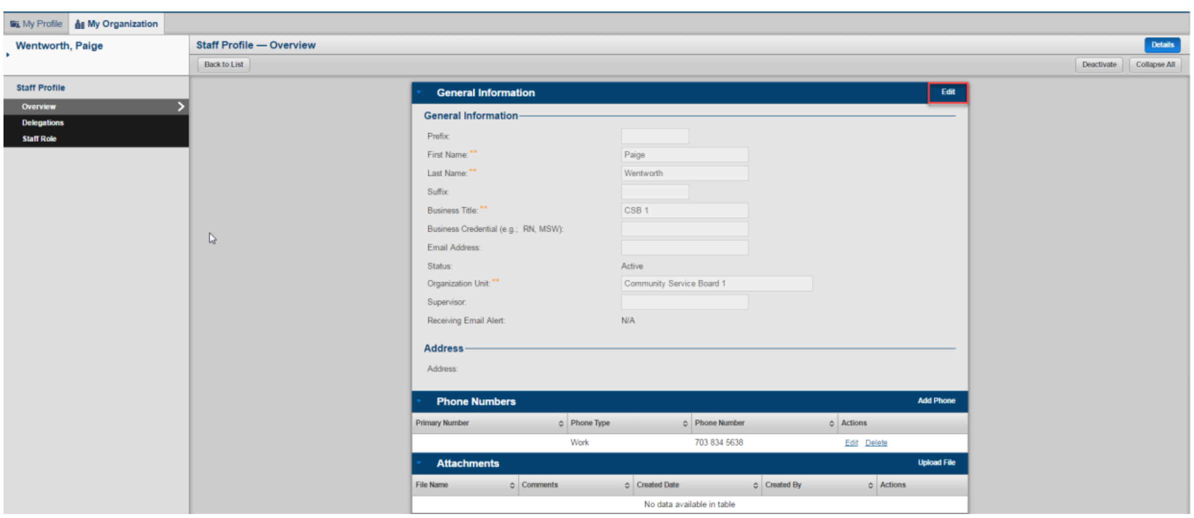


3. Click on the section to edit (edit information for each topic follows)

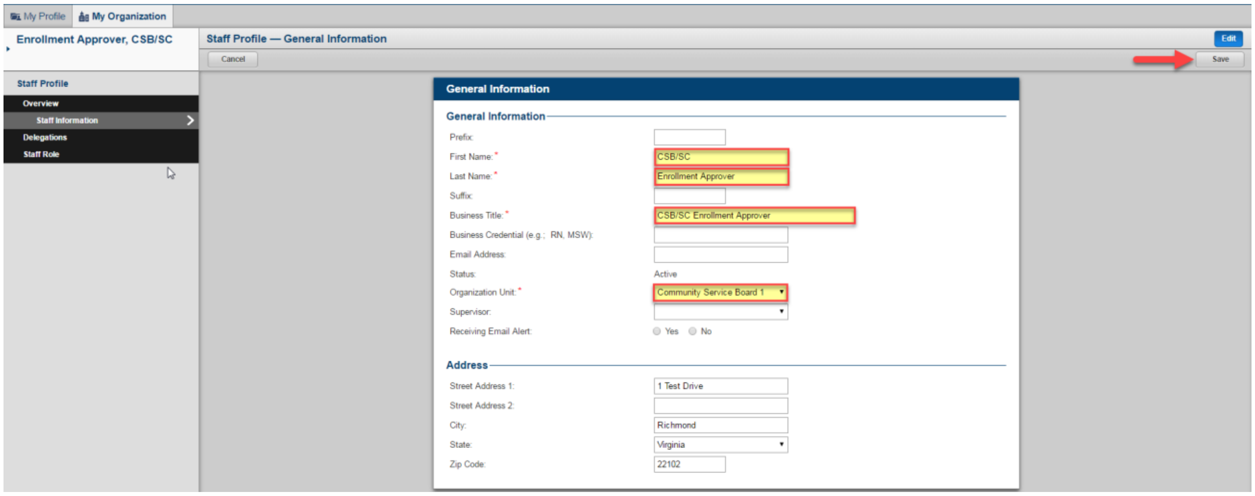


8.4.1 Edit General Information:

4. Click Edit in the General Information section



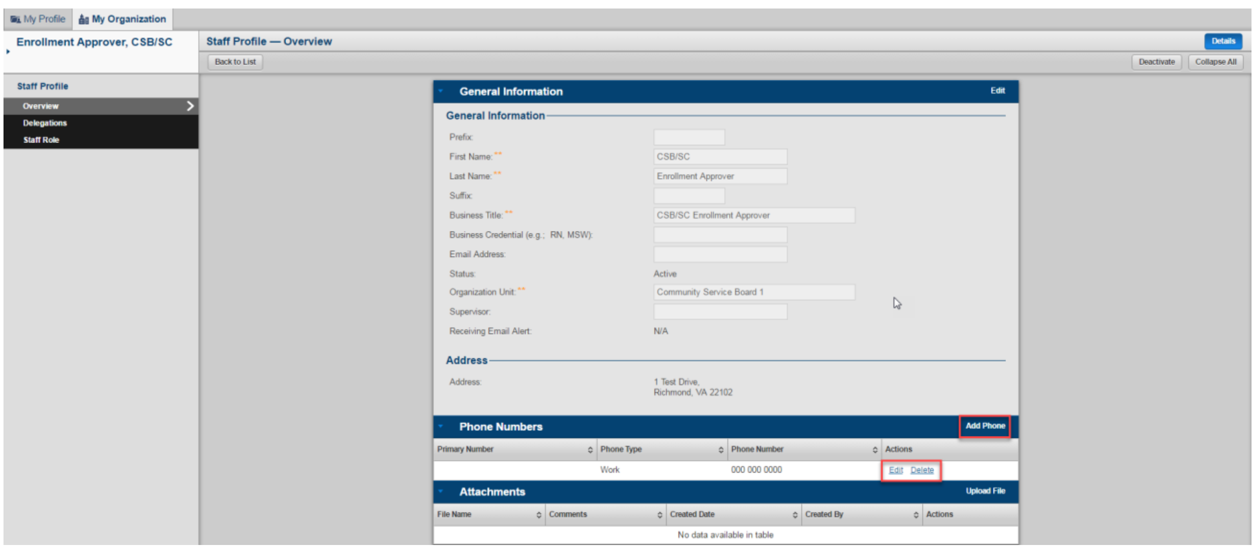
5. Complete edits to Staff Name, Title, Email, Credentials or Email Alert settings



6. Click Save to return to the General Information window

8.4.2 Add/Edit Phone Numbers:

4. Click Add Phone or Edit Phone Numbers and complete required fields
   a. Phone Type
   b. Phone Number



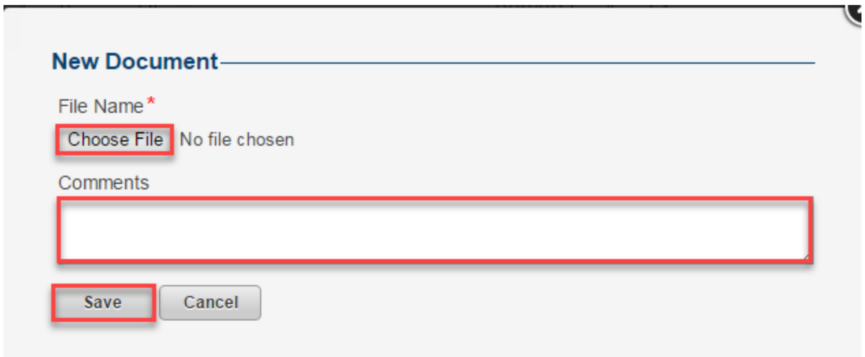
5. Click Save

8.4.3 Delete Existing Phone Number

4. Click Delete to delete existing phone number
5. Confirm deletion of record in pop-up or “Cancel” to cancel deletion

8.4.4 Add Attachments to Staff Profile

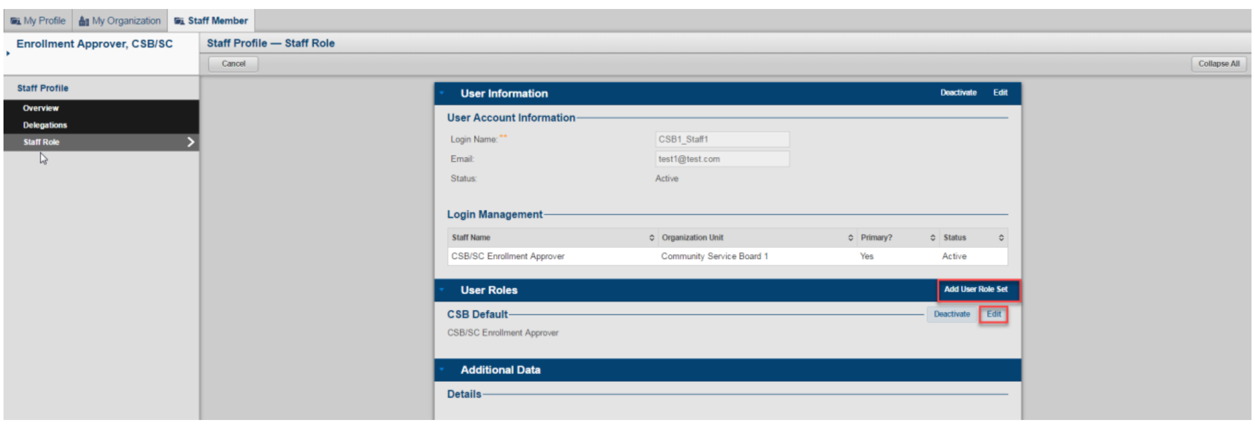
4. Click Upload File
5. Under File Name, Click Choose File



6. Enter any desired comments
7. Click Save

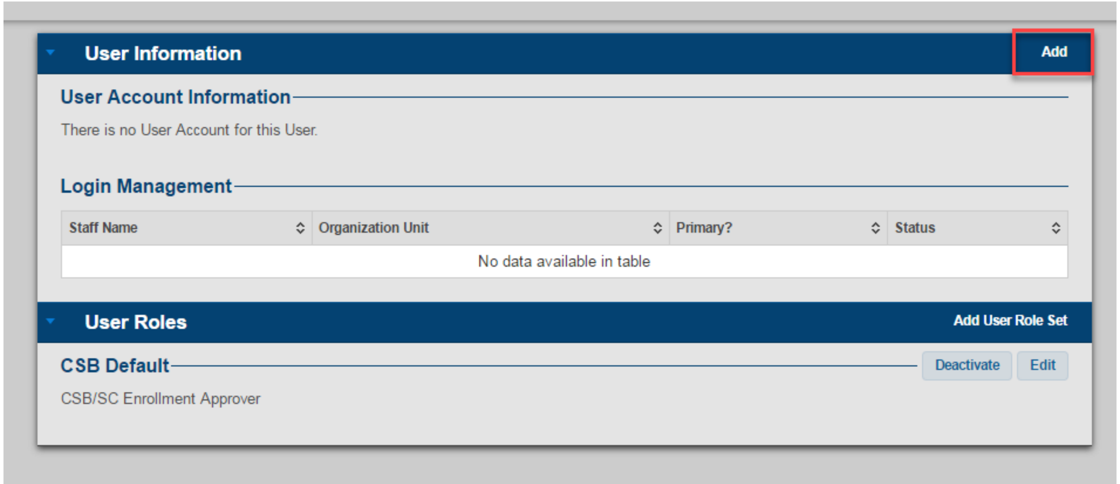
8.4.5 Add User Roles

2. Click Add User Role Set within User Roles to add user roles

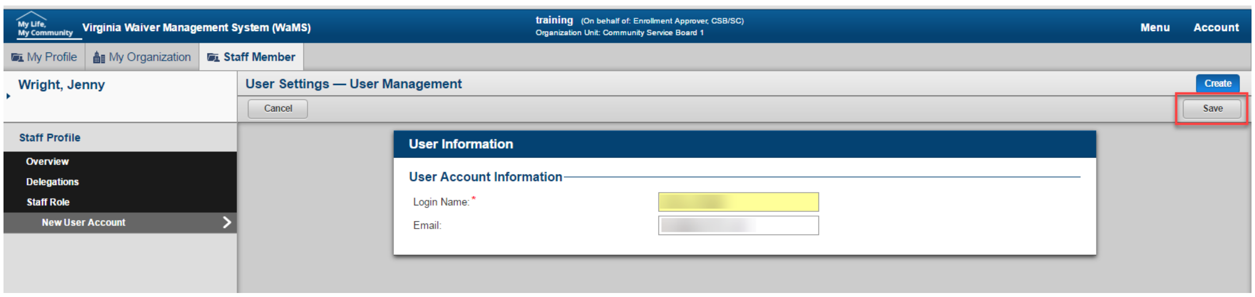


3. Select appropriate role(s) and click Save

4. When the system returns to the Staff Role screen, click Add in the User Information section



5. Enter the Login Name and Email and click Save. This will send the new user an email to log into the site to complete the account setup.



Tip:

- If the email is already tied to a login in the system, then another login with the same email cannot be created

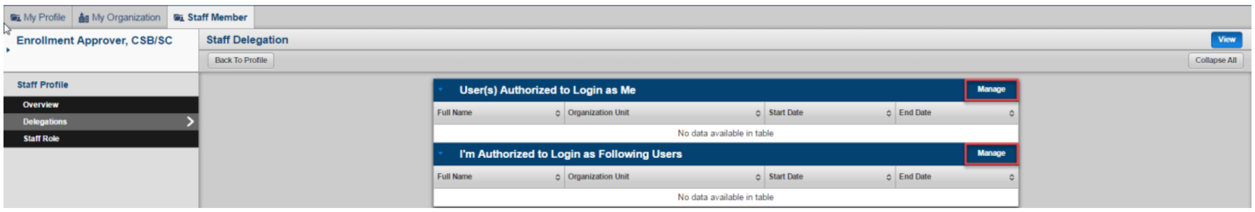
8.4.6 Edit User Roles

2. Click Edit to modify the existing roles
3. Complete required edits and click Save

8.4.7 Setting Delegations

Tip:

- Delegations can be used to manage the ability for users to authorize on behalf of other users. Users log on as the user they are completing the authorization for.



1. Click Manage next to User(s) Authorized to Login as ___
2. Select the checkbox next to the desired user(s)
3. Enter the Start Date and End Date for the delegation

Tip:

- On the End Date, the user will no longer be able to login as that user. Set End Date as the day after the last day this permission will be needed.

8.4.8 Delegate a User for Another User

1. Click “Manage” next to “___ is Authorized to Login as Following Users”
2. Select the checkbox next to the desired user(s)
3. Enter the Start Date and End Date of the delegation

Tip:

- On the End Date, the user will no longer be able to login as that user. Set End Date as the day after the last day this permission will be needed.

8.4.9 Deactivate Delegation(s)

2. Click the checkbox under “Inactivate” on the right
3. Click “Save” when finished

8.5 My Profile

Purpose of This Function

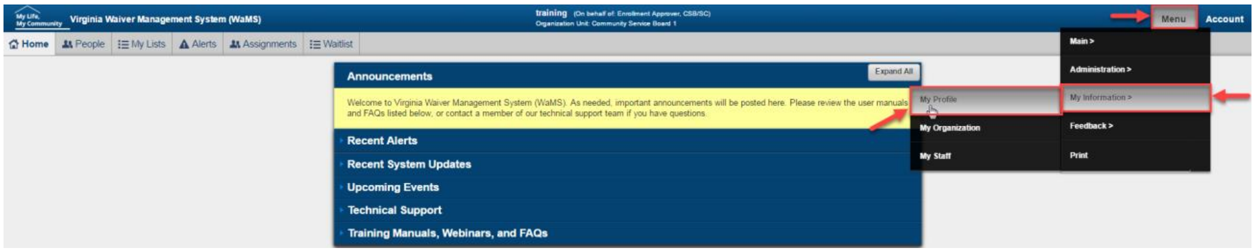
All WaMS users must have a Staff Profile to work within the Virginia Wavier Management System

Who can Use This Function?

Any WaMS User

How to Use This Function

1. In the Menu file, open the My Information tab and update the user information



9 Global Print

Purpose of This Function

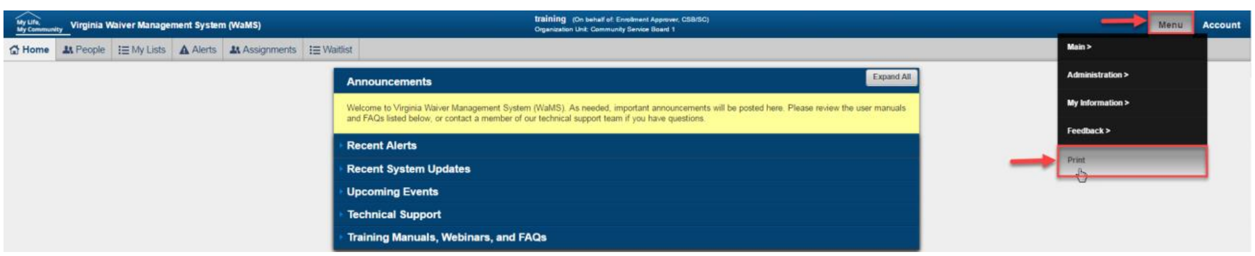
The Global Print allows user to create a PDF version of any page in WaMS for print or reference.

Who can Use This Function

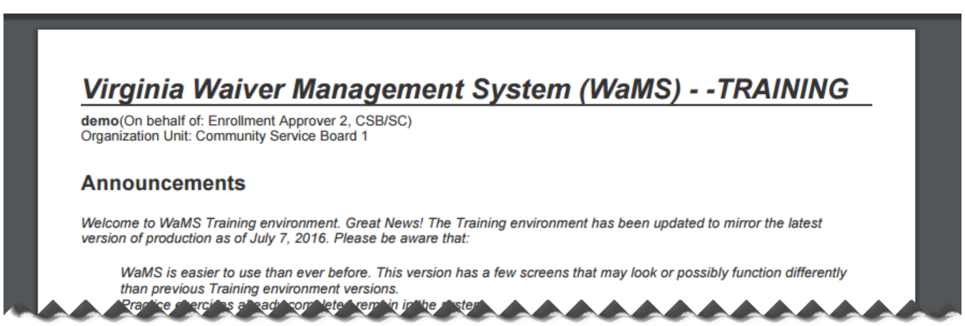
Any WaMS User

How to Use This Function

1. Navigate to Menu, select Print



2. Click "Print", system will generate a PDF version of current page



10 Person's Information – People Tab

10.1 Search for an Individual

Purpose of This Function

Locate the individual's profile or confirm that a profile does not exist

Who Can Use This Function

DBHDS, CSB, Providers, DMAS

How to Use This Function

1. Click on the People tab to receive the search screen

2. Input as much information for an accurate search
3. Verify/select required Assigned CSB field is accurate
4. Search

> Tip:
> - A new profile can be started without a search by clicking the Add Person link in the upper right of the search screen.
> - A new search is recommended anytime an individual indicates they would like to start the process to receive benefits to ensure duplicate profiles are not created.

5. Receive a list of individuals who met the search criteria or a pop-up indicating a profile does not exist
6. Click on the desired action for existing profiles or OK to create a new profile

10.2 Create a New Profile

Purpose of This Function

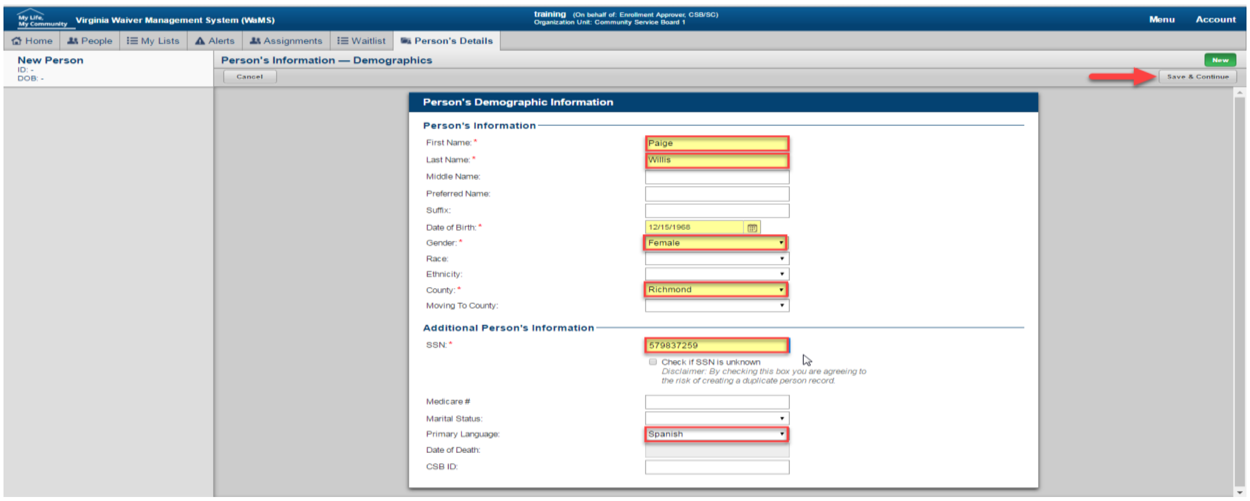
After verifying there is not an existing profile, use this process to create a new profile to begin the process for obtaining benefits

Who Can Use This Function

DBHDS, CSB

How to Use This Function

1. Complete a search to confirm a new profile is needed and click OK to trigger the Person's Details Tab and Person's Demographic Information pop-up
    a. Upper left of screen indicates a New Person is being created. Name, ID and DOB will be populated while completing the Person's Demographic Information
2. Complete all yellow fields which are required
    a. If the individual does not have a SSN, click the box to accept the risk of creating a duplicate person record.
3. Input as much optional information as possible

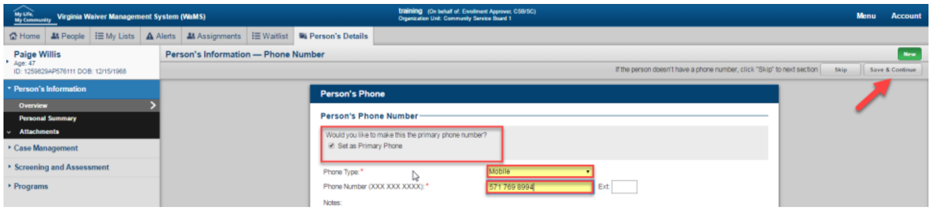


4. Click Save and Continue to receive the message the record has been successfully completed.
    a. The Name, Age, ID and DOB have been populated in the upper left of the screen

Tips:

- Some cities do not have a county designation. Scroll to the bottom of the Counties drop down for "City of…" selections.
- Best practice – Identify a Primary Language if English is not the individual's primary or preferred language.
- Once clicking Save and Continue, information is saved to that point and the profile created.
- Additional phone numbers may be entered by accessing the Person's Overview. Overview -> Phone # -> Click Details -> Click Add Person's Phone Number.
- Only the Primary Phone Number is visible in the Overview.

5. Receive the pop-up for Person's Phone number. Input the required fields and click Save and Continue
    a. If applicable, click to remove the check mark next to "Set as Primary Phone"
    b. Click Skip if the individual does not have a phone number



6. Receive the pop-up for Person's email. Input required field and click Save and Continue
    a. If applicable, click to remove the check mark next to "Set as Primary Email"
    b. Click Skip if the individual does not have an email address

Tips:
- Additional email addresses may be entered by accessing: Person's Information Overview -> Email Address -> Click Details -> Click Add Person's Email.
- Only the Primary Email is visible in the Overview.
- Email communications will be leveraged in the future to make receipt of information easier for individuals.

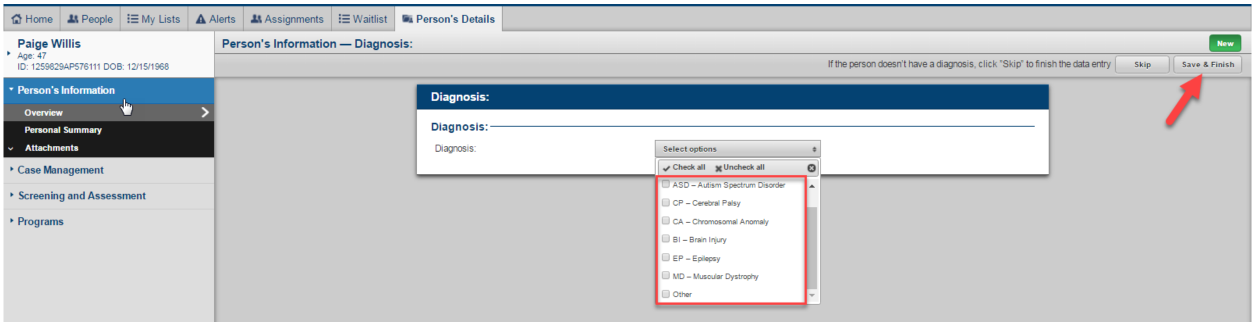
7. Receive the Add Person's Address Form and complete required fields. Add as much optional information as possible Click Save and Continue
    a. If applicable, click to remove the check mark next to "Set as Current Address"
    b. Click Skip if the individual does not have an address

Tips:
- Additional addresses may be entered by accessing: Person's Information Overview -> Address -> Click Details -> Click Add Person's Address.

8. Receive Representative Contact Form. Input required fields and as much optional information as possible. Click Save and Continue
    a. Some selections require additional information. A Comments field will appear if needed
    b. Click Skip if the individual does not have a representative

Tips:
- Quick keys do not work as with an alphabetical list. These selections are in a specific order. "C" defaults to Child/Step Child. "O" defaults to Other Relative.
- Click the down arrow on key board to select Case Manager or Other.

9. Receive Diagnosis pop-up – identification is optional. Select the diagnosis from the drop down. Click Save and Finish
    a. Click Skip if the individual does not have a diagnosis



10. Receive the Overview menu

10.3 Overview Menu

Purpose of This Function

Provides detailed insight into the individuals profile and allows editing, managing or viewing based on access level

Who Can Use This Function

DBHDS, CSB, Provider, DMAS

How to Use This Function

1. Access the Person's Information Overview menu: Click People Tab -> complete a Search –> click Summary link -> click Overview in the Persons Information menu on the left of window

Navigation Tip:

- The Menu identifies which categories allow only for viewing of Details, Editing or Managing content
- Click Expand All in the upper right corner to see all categories in a long stream

2. Click Edit, Details, or Manage to the right of the category name to view or take action

a. Edit – Click Save in the upper right corner once information is added or changed or Cancel in the upper left corner if no edits are made
    i. Person's Demographics
    ii. Living Situation
    iii. Diagnosis
b. Details – Click Add <topic> to add information then Save & Close. Click Back to Overview to return to the Overview screen
    i. Medicaid #
    ii. Phone #
    iii. Email
    iv. Address
c. Manage – Input information then click Add Goal / Add Strength. Click Back to Overview to return to the Overview screen
    i. Goals
    ii. Strengths
d. Add Representatives- Click Save in the upper right corner once information is added or changed or Cancel in the upper left corner if no edits are made
    i. Representatives

Tip:
- A Medicaid number entered must be checked as the primary Medicaid number in order for a person's record to interface with VAMMIS and the Service Authorization to be processed.
- A person can have multiple phone numbers, email addresses and physical addresses within WaMS

10.4 Personal Summary

Purpose of This Function

View key information from actions completed through the WaMS system

Who Can Use This Function

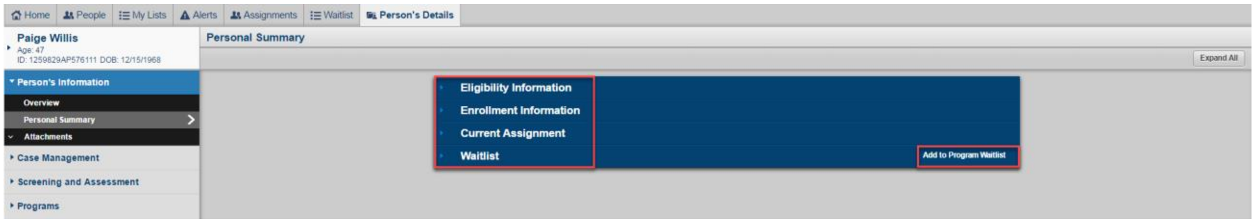
DBHDS, CSB, Provider

How to Use This Function

Note: The Personal Summary is populated only as actions are completed within the WaMS system.

1. To access the Personal Summary click the People tab, complete a search and click the Summary link to the far right of the name.
    a. Menu on left of window shows the individual's name, age and DOB

b. The Personal Summary provides a snapshot of what has transpired for the individual
c. Waitlist includes a link to Add to Program Waitlist



2. Click on the topic to view information or click Expand All to see all information

10.5 Attachments

Purpose of This Function

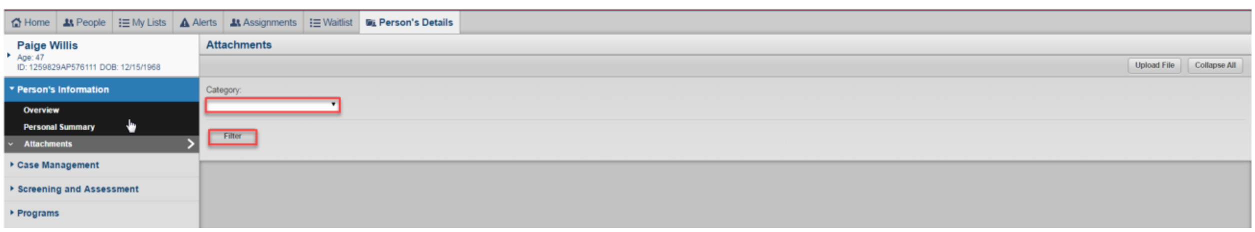
Attach, edit the category or delete documentation linked to the individual's profile

Who Can Use This Function

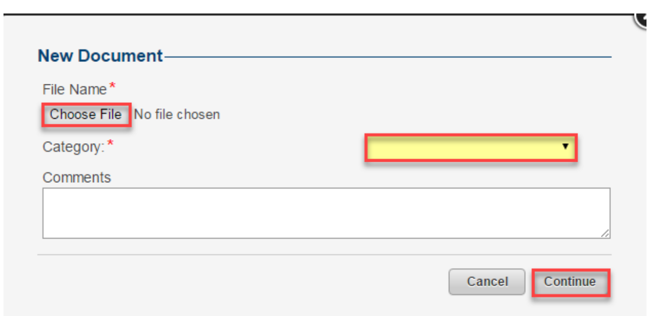
DBHD, CSB, Provider

How to Use This Function

1. To access Attachments: click People Tab -> complete a Search -> click Summary link -> click Attachments in the Person's Information menu
2. Documentation already associated with the individual's profile is visible
3. Select the desired Category and click Filter to see Attachments specific to that category



4. Add a file by clicking Upload File in the upper right of the window to receive the New Document pop-up
5. Click Choose File to search for the file to be added



6. Use the dropdown to identify the document category and add any relevant comments
7. Click Continue to see the added document name. The Category field defaults to the selection made when uploading the file

Navigation Tip:
- Only the newly uploaded file is visible on the Attachments screen.
- To see all Attachments, use the Category drop down to select the top blank area to make the Category field blank. Click Filter.

8. Click on the document name to view it
9. Click Edit to change the Category
10. Click Delete and confirm the deletion to remove the Attachment

11 Case Management

11.1 CSB Assignments – Create, Transfer, Deactivate

Purpose of This Function

Assign a new CSB to the individual

Who Can Use This Function

DBHDS, CSB

How to Use This Function

Note: Prior to this the following actions would have occurred:
- Profile Created (See: Person's Information, Create a New Profile)

The CSB is systematically assigned by WaMS as long as the Service Coordinator who created the profile is assigned to a CSB OU.

1. View an Existing CSB Assignment
    a. Click Case Management
    b. Click View to the far right of the name

11.1.1 Transfer an Assignment

1. Click Create New button to access the Community Service Board Assignment screen
    a. The current CSB assignment is identified in the "From" Field
    b. Select the "To CSB" using the drop down list
    c. The effective date defaults to today's date but can be changed to a future date
2. Click Submit to receive confirmation of the Transfer

Tips:

- CSBs cannot be changed while Person is on a Wave.
- The SC is systematically unassigned when a CSB assignment changes

11.1.2 Deactivate a CSB Assignment

1. Click View to the far right of the name on the CSB Assignments list
2. Click Deactivate in the upper right corner of the window
3. The CSB Assignment status is changed to Inactive

11.2 CSB Support Coordinator Assignment

Purpose of This Function

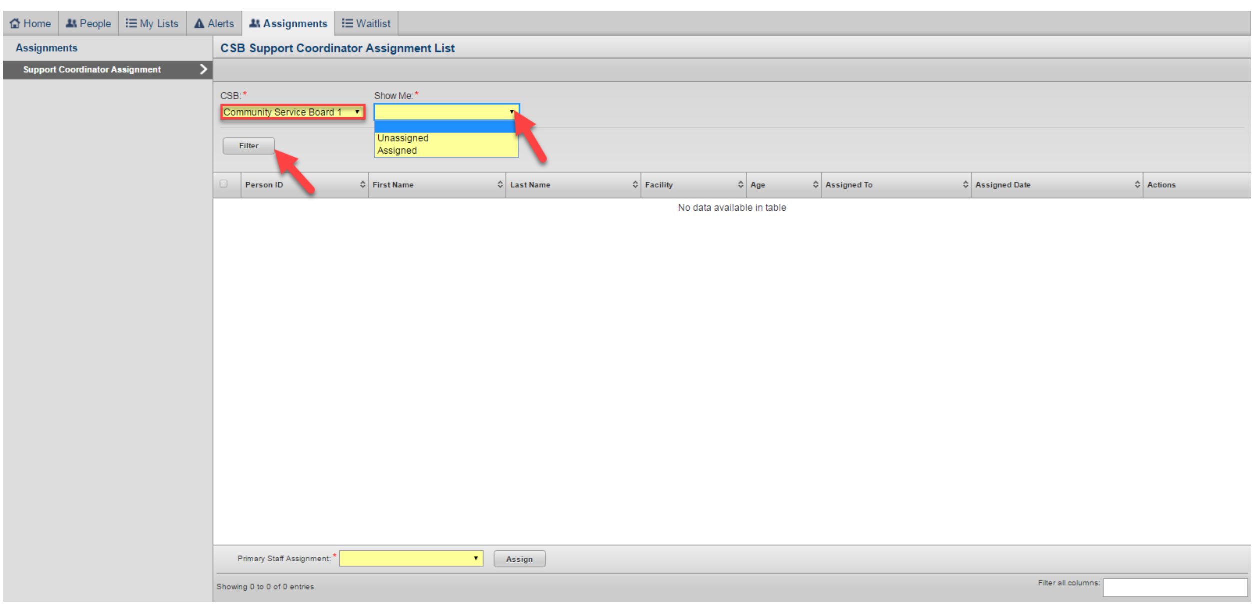
Assigning a Support Coordinator to particular person(s)

Who Can Use This Function

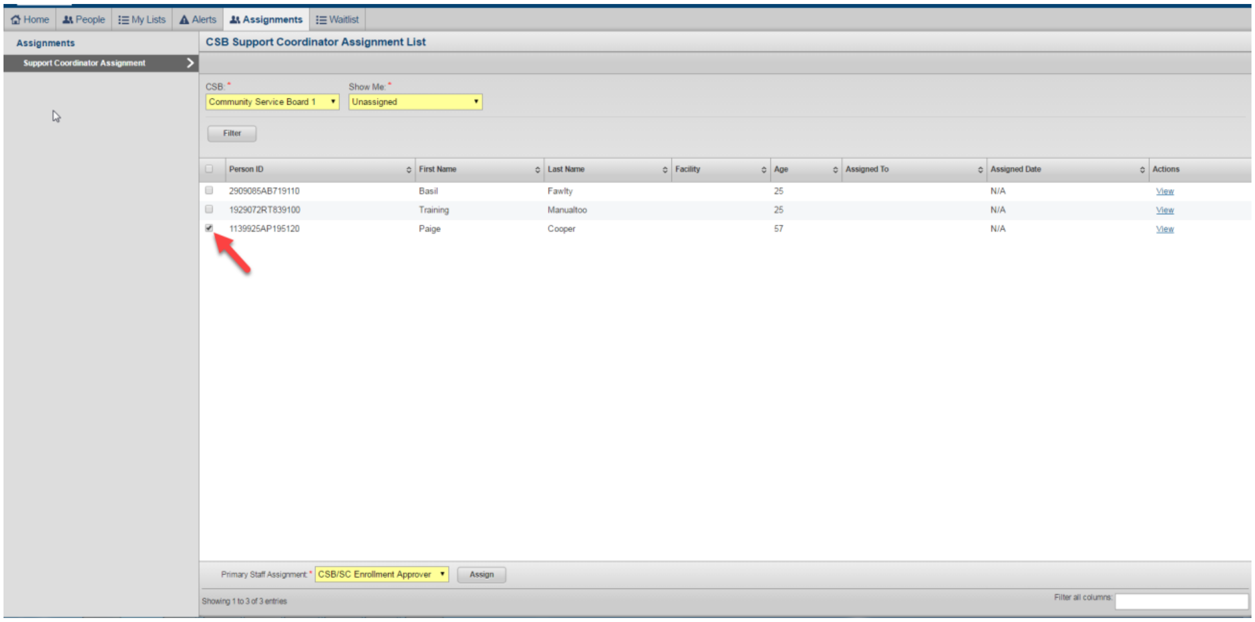
DBHDS, CSB

How to Use This Function

1. Go to “Assignments” tab
2. On left navigation, click “Support Coordinator Assignment”
3. Choose CSB from dropdown
    a. If this is a CSB user, that user’s CSB will default and be the only CSB available
4. Choose “Unassigned” or “Assigned” from the Show Me dropdown



5. Click Filter
6. Click checkbox next to person(s) for assignment



7. At the bottom, for “Primary Staff Assignment,” choose a Staff from the menu
8. Click “Assign”

11.3 Service Notes

Purpose of This Function

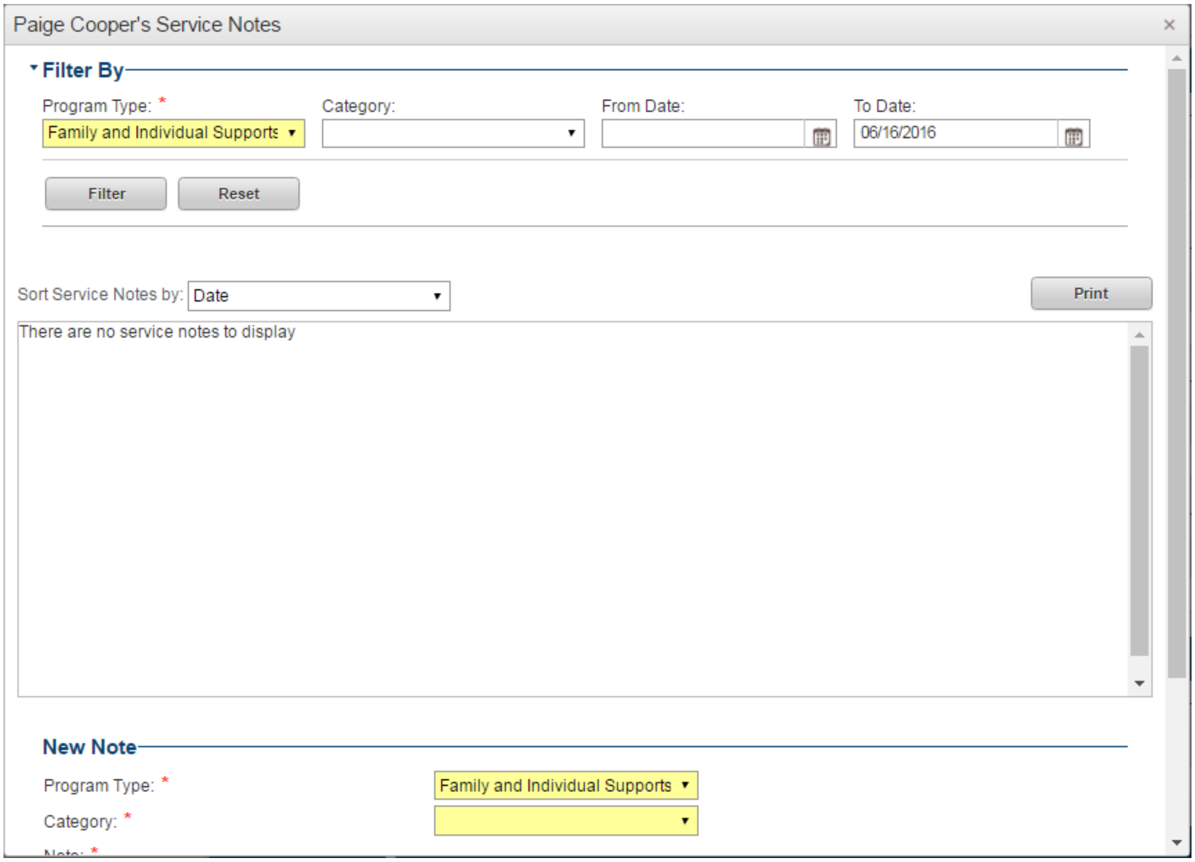
Add, view or print activity on the Person’s profile

Who Can Use This Function

DBHDS, CSB, Provider

How to Use This Function

1. Access the Service Notes pop-up (People tab -> Search -> click Summary -> Case Management -> Service Notes)



11.3.1 View Service Notes

2. Identify the Program Type (required field)
3. Add additional known optional information
    a. Category
    b. From Date
    c. To Date
4. Click Filter to receive the notes

Tip:
- CSBs have access to Person profiles, including Service Notes, in their specific OU
- DBHDS has access to Person profiles, including Service Notes, in all OU streams

5. Service Notes may be sorted by:
    a. Date (default)

b. Entered By

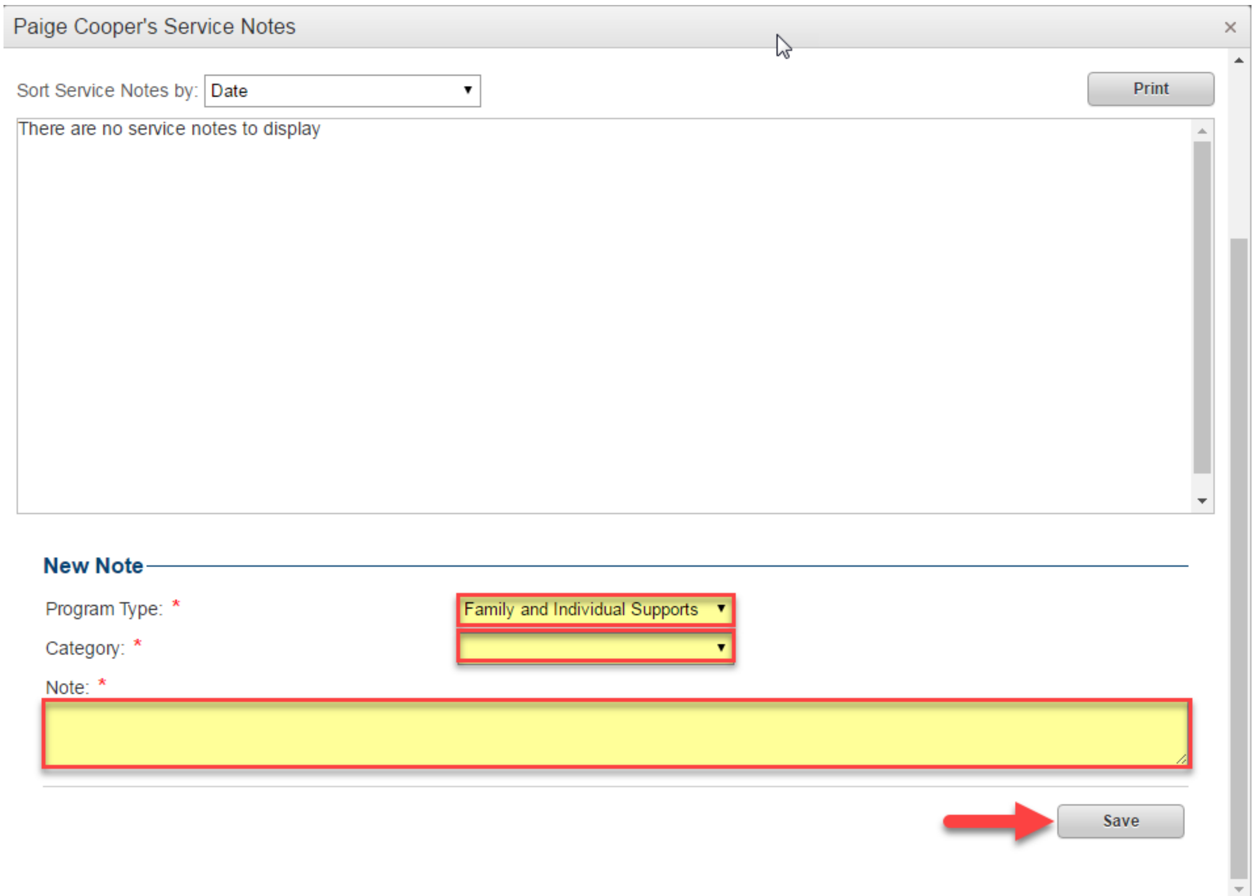
c. Organization Unit

11.3.2 Print Service Notes

6. Click Print to print available Notes

11.3.3 Add Service Notes

7. Scroll to the New Note section



8. Identify the Program Type (this field will default to the current program type of the slot the person is assigned to):
   a. Community Living
   b. Family and Individual Supports
   c. Building Independence
9. The Category field is triggered. Identify the category (required field)
10. Add Notes in the required field

Tip:
- Notes should be brief but provide enough information for someone else to understand the full picture

11. Click Save

Tip:
- Additional Notes may be added as needed by following the above process

12. Close the Service Notes window once desired actions are completed

12 Screening and Assessment

12.1 Virginia Individual Developmental Disabilities Eligibility Survey (VIDES)

Purpose of This Function

The VIDES survey details the process for determining the eligibility and Level of Care for infants under age of 3, children aged from 3 to 18, and adults over the age of 18.

Who can Use This Function?

Any WaMS User

How to Use This Function

All persons must have a CSB assignment made before the user can create a VIDES for that person.

12.1.1 Create VIDES

1. Open Screening and Assessment on Left Navigation of Person's Profile
2. Select VIDES
3. Click Create New

Tip:
- A CSB Assignment must be completed before VIDES is started
- If a VIDES has been completed within the past 6 months, Help text will display at the top of the popup window

4. Enter Survey date (which will auto-populate the person's age based on the survey date) and select Continue
5. Click Start to begin the survey
   a. On the Information Intake page the survey version is automatically checked and includes the individual's :
      - First and Last Name

- ○ Date of Birth
- ○ Age on Assessment Date
- ○ Survey Date
- ○ Evaluator

6. Start the Survey
   a. The VIDES Survey has sections that must be filled out completely. Any unanswered question (s) will result in an incomplete survey.

> Tip:
> - Children of different ages have different question requirements. Their questions will not go in alphabetical order. There may be missing alphabet designations. This is normal
> - VIDES results are visible prior to submission; the results of each section (Met or Not Met) will be displayed once the status of the section is changed to complete

   b. Each section has a comment/notes box for addition information if needed.
   c. Once the survey is completed, click save and return back to WaMS to see the results.
   d. Submit the VIDES questionnaire.
   e. Review the VIDES questionnaire and verify eligibility status.

12.1.2 Edit VIDES

1. Select the Individual's VIDES to be edited.
2. Open the VIDES summary.
3. Click the Edit tab.

> Tip:
> - VIDES may only be edited prior to submitting
> - VIDES results are visible prior to submission; the results of each section (Met or Not Met) will be displayed once the status of the section is changed to complete

12.1.3 Discard VIDES

1. The user can discard a VIDES questionnaire prior to submitting for eligibility.
2. Click the summary tab on the VIDES to be discarded.
3. Click the discard card tab. The VIDES questionnaire is removed from the database.

> Tip:
> - VIDES may only be edited prior to discarding

12.1.4 VIDES Result (Details)

1. Access Screening and Assessment in the Person's Detail folder
2. Select VIDES

3. If the person has a submitted VIDES, then the results will display

Tips:
- CSBs can create and edit the VIDES
- Providers can only view the VIDES

12.2 Support Intensity Scale (SIS)

Purpose of This Function

To view all past and present SIS uploaded into the WaMS system by DBHDS

Who Can Use This Function

DBHDS, CSB, Provider, DMAS

How to Use This Function

1. Access the Personal Summary Page (People tab -> Search -> click Summary)
2. Click Screening and Assessment
3. Click SIS

Tips:
- The latest SIS result for the person will be displayed on multiple pages throughout the system, including the Personal Summary and Service Authorization
- Only the SIS page will display SIS results that are not current

13 Programs

13.1 Enrollment Status

13.1.1 Enrollment Status – Auto Create Enrollment Status

Purpose of This Function

WaMS automatically creates the two types of Enrollment Status:

- Projected Status – All preconditions have been met and a slot has been assigned. This is the 1st Enrollment Status individuals have.

Who Can Use This Function

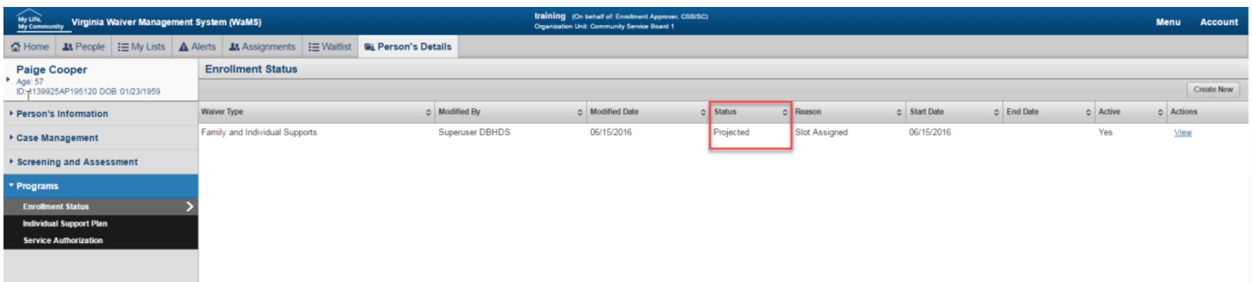
DBHDS, CSB

How to Use This Function

Note: Prior to this the following would have occurred:

- Profile created (See: Personal Information)
- VIDES submitted and LOF for DD Waiver Met (See: VIDES)
- Individual put on Waitlist and Wave Created (See: Waitlist)
- Slot has been assigned (See: Slots)

1. Access the Personal Summary Page (People tab -> Search -> click Summary)
2. Click Programs
3. Click Enrollment Status



13.1.2 Enrollment Status – Manually Create Enrollment Status

Purpose of This Function

Create a new Enrollment Status to update if an individual is or is not receiving services and the reason for that status

Who Can Use This Function

DBHDS, CSB

How to Use This Function

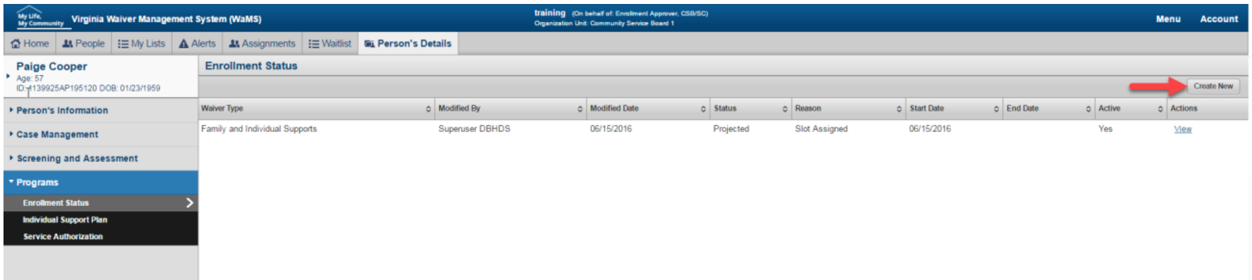
Note: Prior to this the following would have occurred:

- Profile created (See: Personal Information)
- VIDES submitted and LOF for DD Waiver Met (See: VIDES)
- Individual put on Waitlist and Wave Created (See: Waitlist)
- Slot has been assigned (See: Slots)

1. Access the Personal Summary Page (People tab -> Search -> click Summary)
2. Click Programs
3. Click Enrollment Status

Tip:
- Enrollment Status will not appear if a CSB assignment has not been completed.

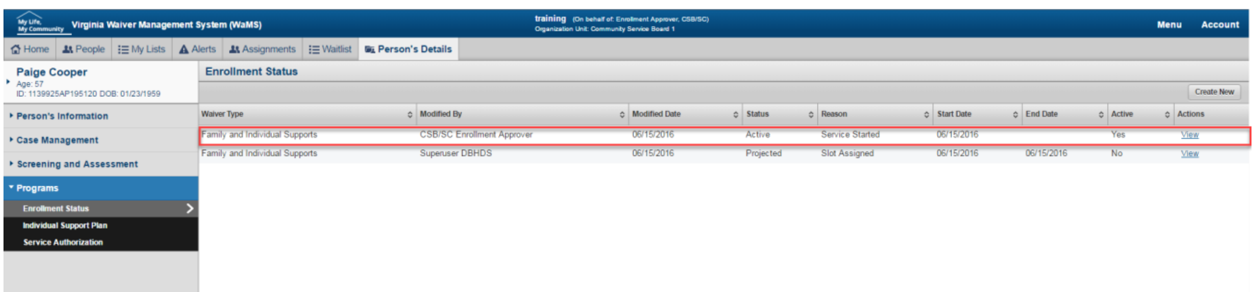
4. Click Create New to receive the Select Waiver pop-up



5. The Select Waiver pop-up defaults to the currently assigned waiver.
6. Click Continue to receive the Enrollment Status screen
7. Complete required Status Update fields:
    a. New Status: Defaults to an available selection. Other possible options will be in the drop-down
    b. Status Change Reason: Defaults to an available selection. Other possible options will be in the drop-down
    c. Date Started: Defaults to today's date however it may be back or forward dated
8. Add additional comments and click Save to return to the Enrollment Status – List page

Tip:

- Depending on the status chosen, additional fields may be required. WaMS will prompt the user to fill these out if needed.



9. The new Enrollment Status is identified

Enrollment Status - List	Enrollment Status Pop-Up – Status Update		Enrollment Status - List
Status Field	New Status Field	Status Change Reason Field	Status Field
Current Status of Enrollment	*What the status can be changed to based on current status*	*Reason for the new status*	*Current Status of Enrollment*
Projected	Active	Service Started	Active
	Terminated	Opened in Error	Pending Appeal
		Moved into another waiver	Pending Appeal
		Moved into ICF/MR/NH	Pending Appeal
		Moved out of state	Pending Appeal
		Refused Services	Pending Appeal
		Change in Status	Pending Appeal
		Deceased	Released
		Terminated	Pending Appeal
Active	Hold	ICF/IID Admission	Hold
		Incarceration	Hold
		Rehab hospital	Hold
		Loss of Medicaid Eligibility	Hold
		No waiver services for 30 uninterrupted days	Hold
	Terminated	Opened in Error	Pending Appeal
		Moved into another waiver	Pending Appeal
		Moved into ICF/MR/NH	Pending Appeal
		Moved out of state	Pending Appeal
		Refused Services	Pending Appeal
		Change in Status	Pending Appeal
		Deceased	Released
		Terminated	Pending Appeal
Hold	Active	Service Resumed	Pending Appeal
Terminated (Note: Does not apply to “Deceased” Status Change Reason)	Active	Appeal Approved	Active
	Released	Slot Released	Released

Tip:

The Enrollment Status – The above list identifies 2 instances the slot has been released from the individual. The Enrollment Status cannot be changed until a new slot is assigned.

- Status: Terminated Reason: Deceased
- Status: Released Reason: Slot Released

13.2 Individual Support Plan

Purpose of This Function

To determine the services needed for an individual and the providers involved in providing these services

Who Can Use This Function

DBHDS, CSB
Provider (add notes, add attachments only)

How to Use This Function

Tips:

- Default start date of an individual service defaults to plan start date
- Default end date is displayed as Plan start date plus one year
- ISP service will only display services with selected program type based on Program Type data from the Service Definition
- The user will receive an error message when trying to add any date over one year ago in Eligibility section
- Waiver type dropdown defaults to slot waiver type of person

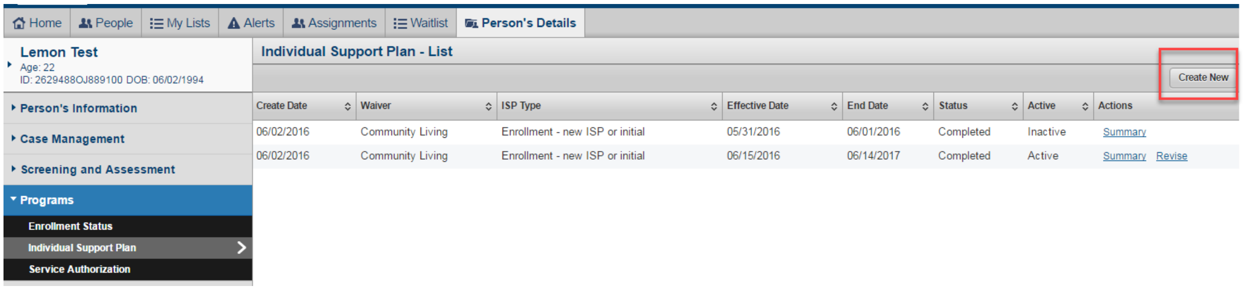
13.2.1 Create an ISP

Tips:

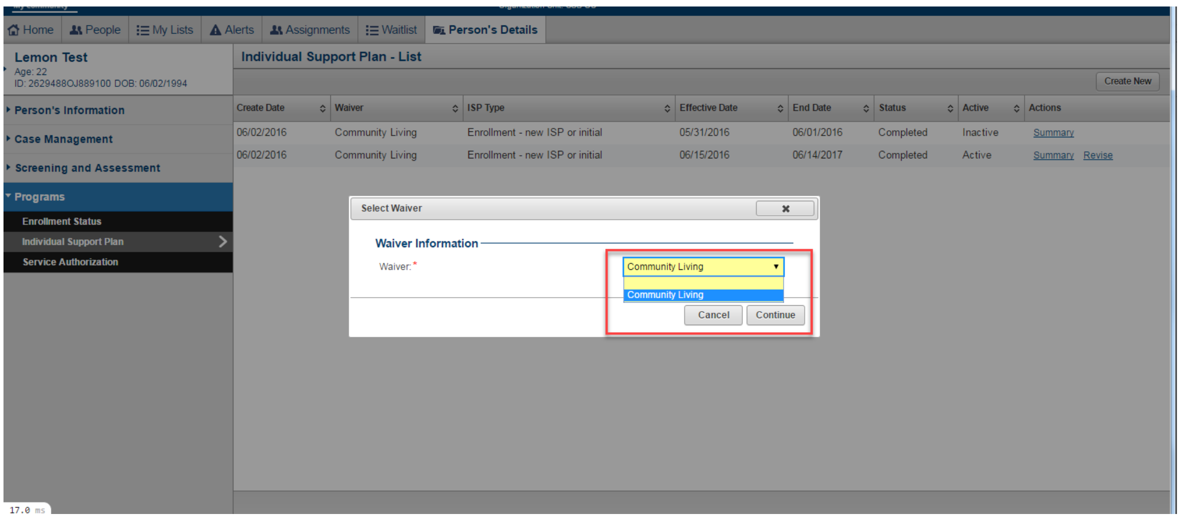
- CSBs cannot create/edit incomplete ISPs when a person's slot is released
- A new ISP cannot be created if another ISP currently an ISP In-Progress
- ISP cannot be created when a person does not have a slot assigned

1. Access the Personal Summary (click People tab -> Search -> click Summary)
2. Under Programs, select Individual Support Plan

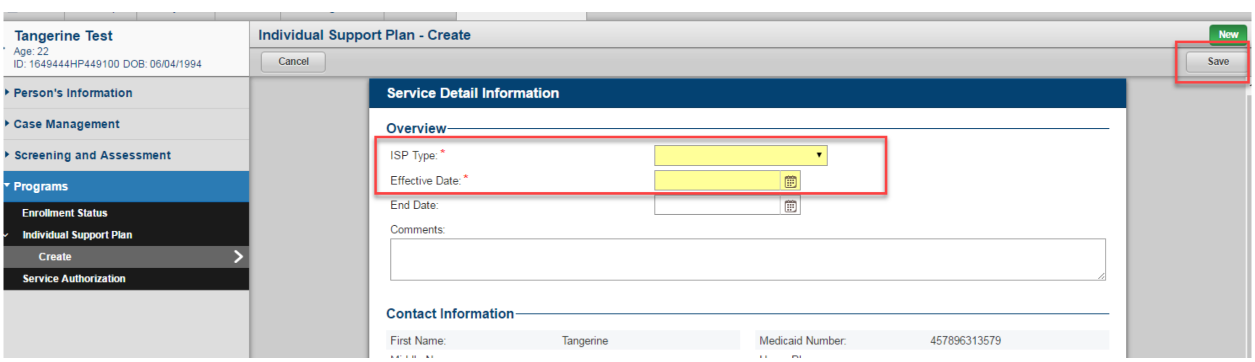
3. Click Create New button



4. Confirm Waiver type from dropdown and click Continue button



5. Complete required fields



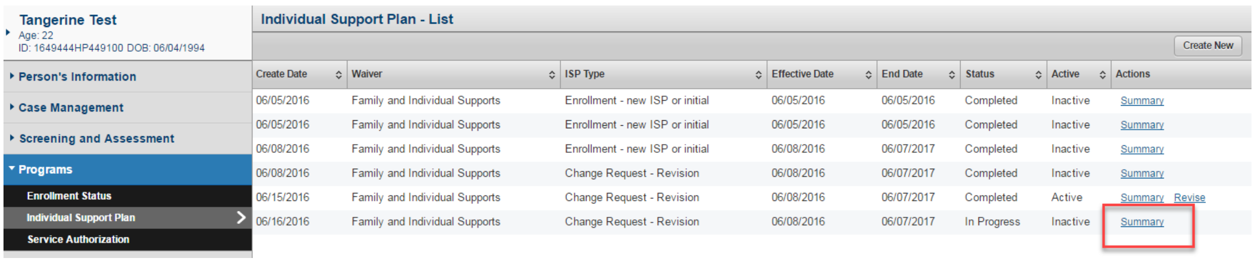
6. Click Save

13.2.2 Edit in-progress ISP:

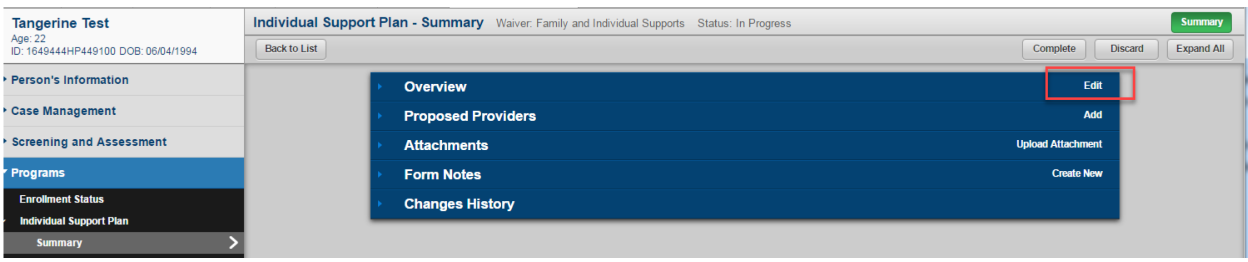
Tip:

- An ISP cannot be edited once it is "complete"

1. Navigate to Personal Summary (Click People tab -> Search -> click Summary)
2. Under Programs, select Individual Support Plan
3. In Actions column, click Summary of ISP to be edited



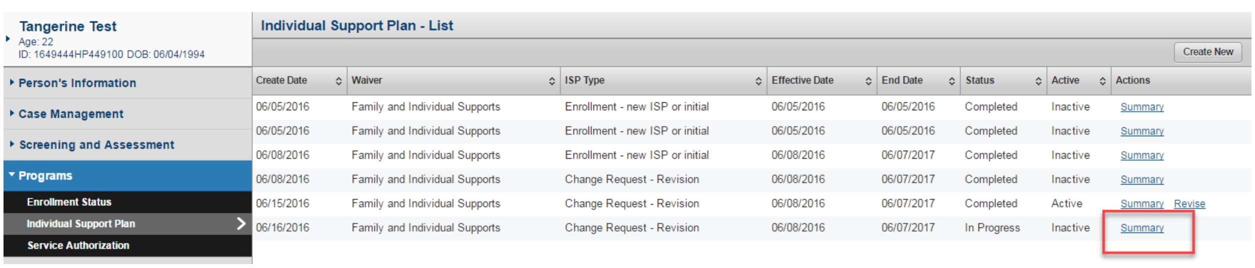
4. Click Edit Complete Edits to make the changes



5. Make the changes
6. Click Save

13.2.3 View in-progress ISP

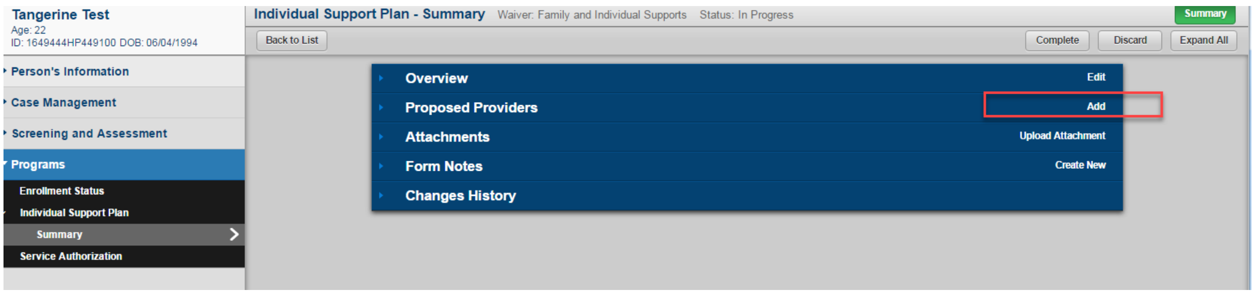
1. Navigate to Personal Summary (Click People tab -> Search -> click Summary)
2. Under Programs, select Individual Support Plan -> Summary
3. In Actions column, click Summary of ISP to be viewed



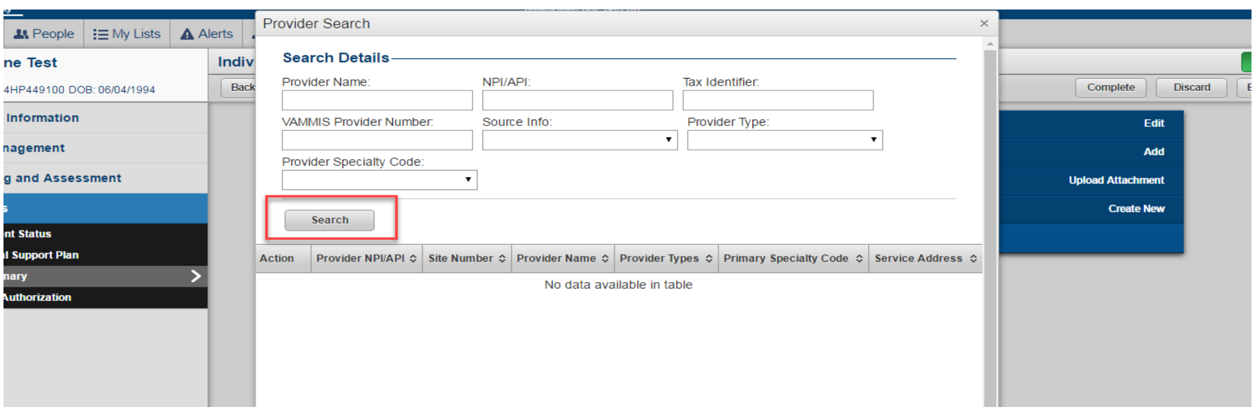
13.2.4 Add Provider to an In-Progress ISP

Tips:
- If the Provider is not on the ISP, the Provider can only view general information about a person
- Providers automatically lose access to person's details once the ISP end date has passed
- Providers lose access to person's details if taken off the ISP

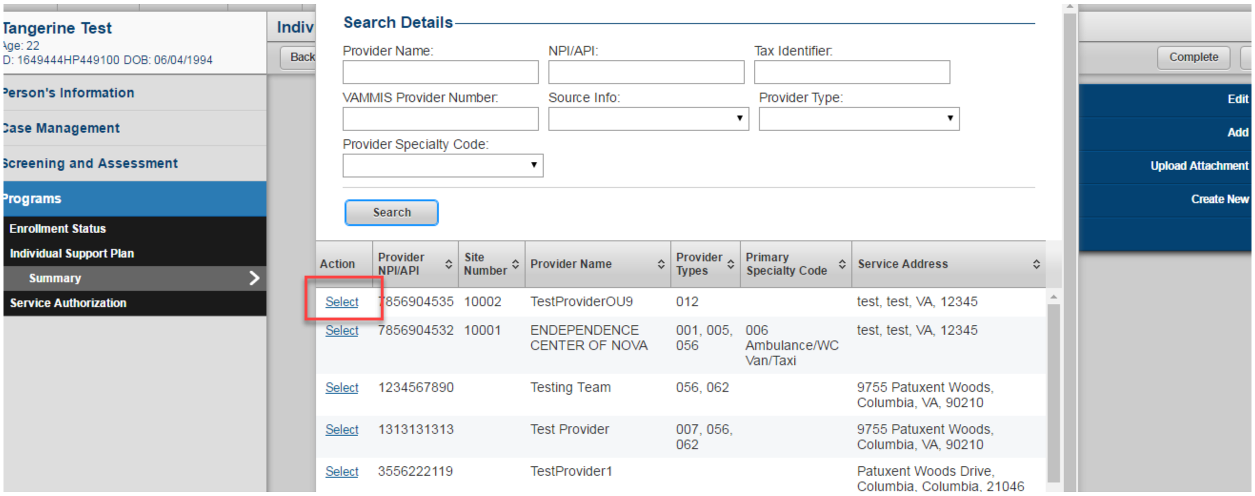
1. Navigate to Personal Summary (Click People tab -> Search -> click Summary)
2. Under Programs, select Individual Support Plan -> Summary
3. In Actions column, click Summary of ISP providers are to be added to
4. Click Add in the Proposed Providers header



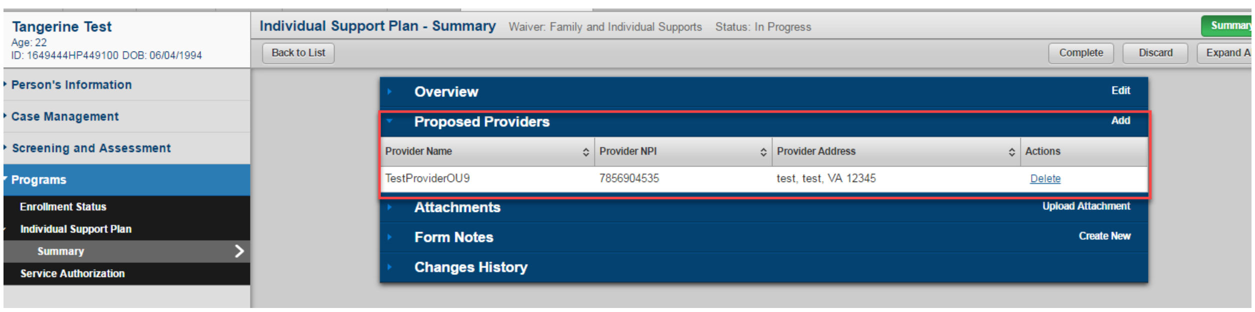
5. Click Search



6. Click Select button for Providers to be added

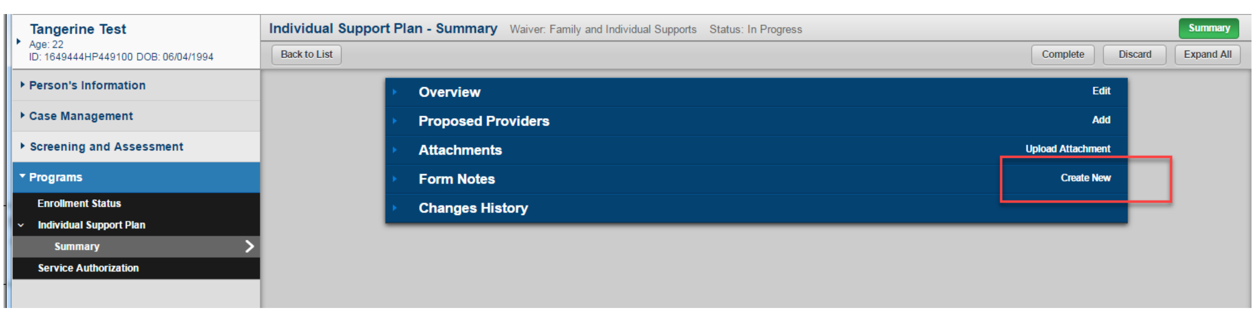


7. Click Proposed Providers header

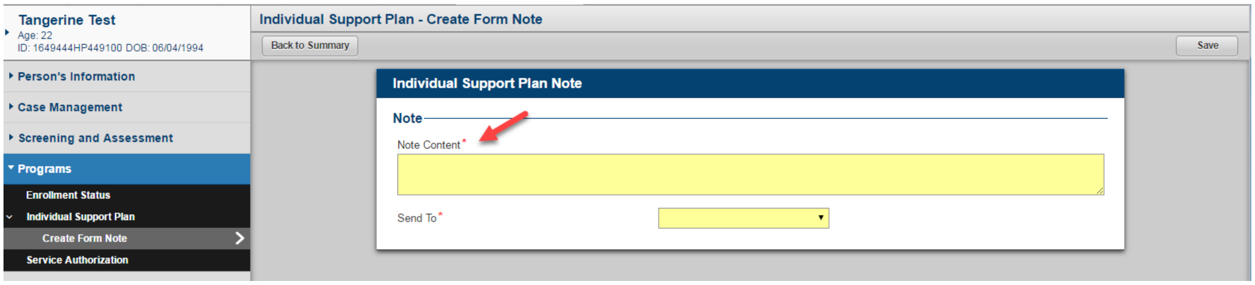


13.2.5 Add Notes to an In-Progress ISP

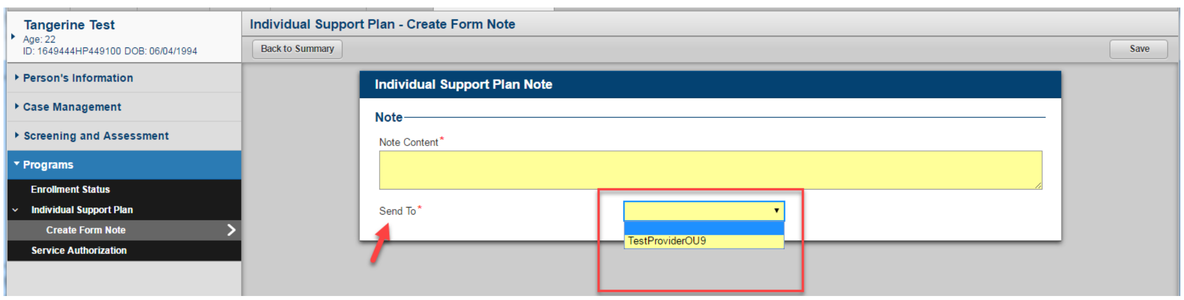
1. Navigate to Personal Summary (Click People tab -> Search -> click Summary)
2. Under Programs, select Individual Support Plan -> Summary
3. Under Actions, click Summary
4. Click Create New in the Form Notes header



5. Enter a note in the Note Content box



6. Select the recipient from the Send To dropdown and click Save

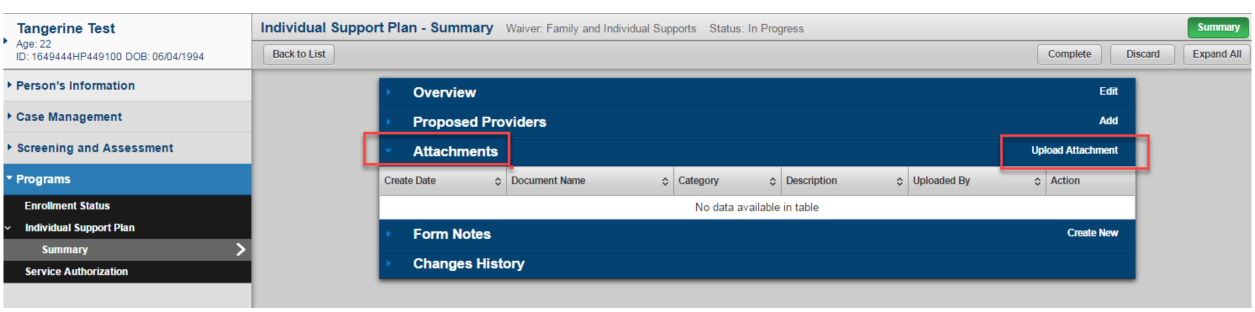


13.2.6 Add an Attachment to an in-progress ISP:

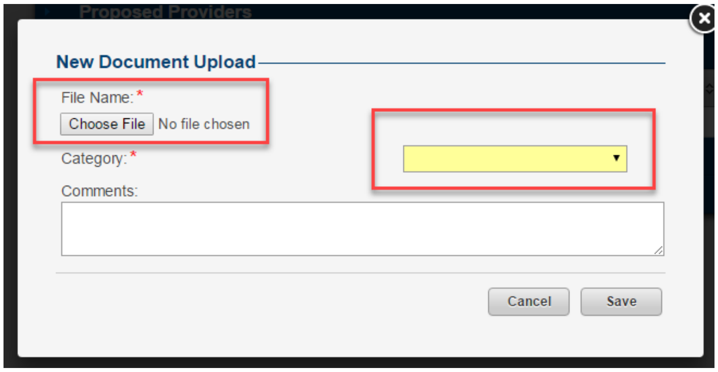
Tips:

- CSBs and Providers cannot delete attachments created by anyone else

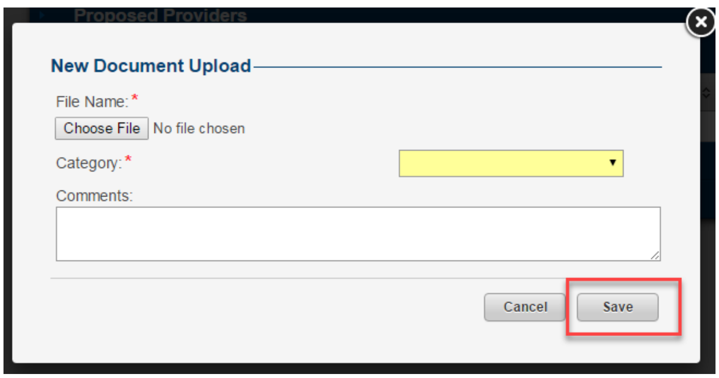
1. Navigate to Personal Summary (Click People tab -> Search -> click Summary)
2. Under Programs, select Individual Support Plan
3. Under Actions, click Summary
4. Click Attachments header
5. Click Upload Attachment



6. Select file to add and select Category from the Category dropdown

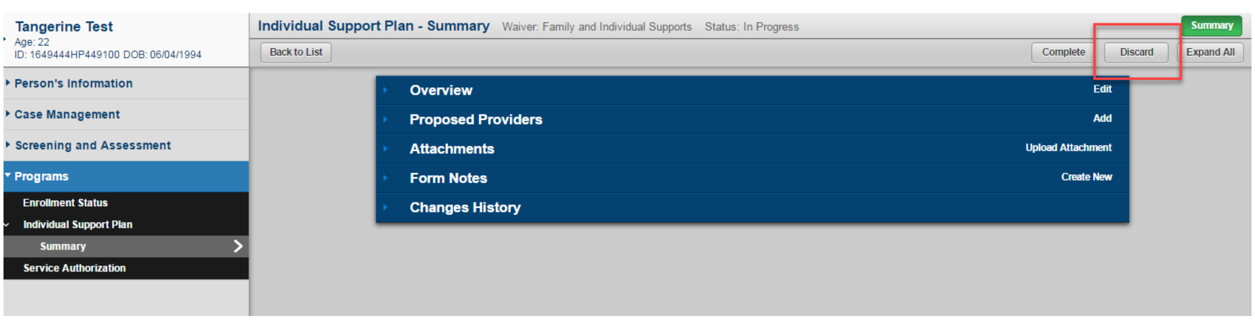


7. Click Save

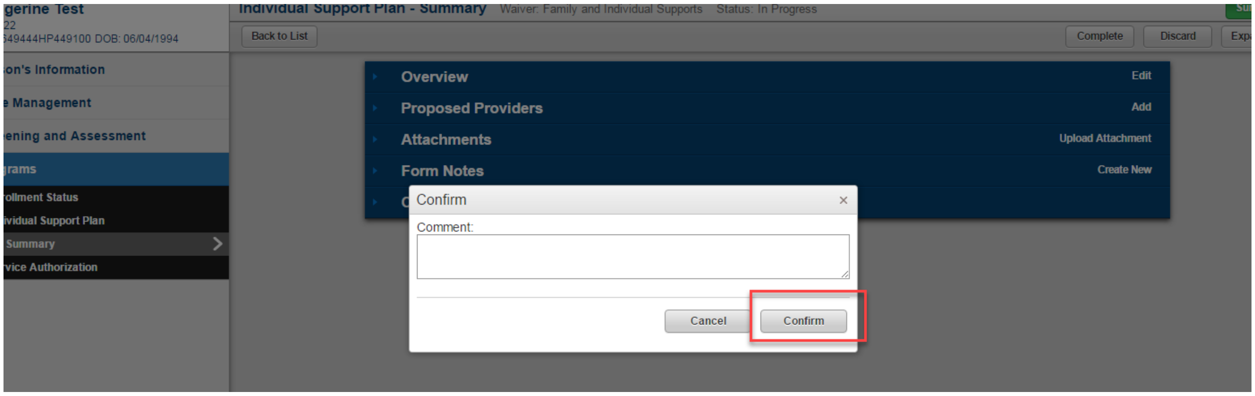


13.2.7 Discard an In-Progress ISP

1. Navigate to Personal Summary (Click People tab -> Search -> click Summary)
2. Under Programs, select Individual Support Plan -> Summary
3. Under Actions, click Summary
4. Click Discard button

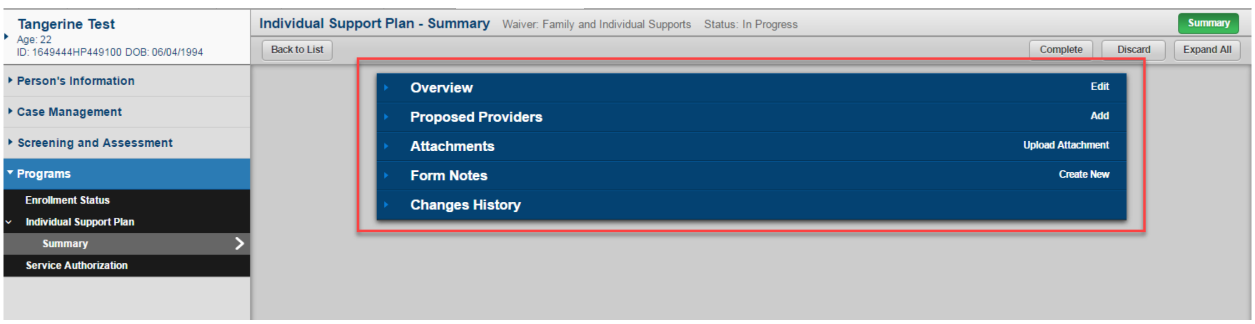


5. Type in reason for the discard (optional), click Confirm button

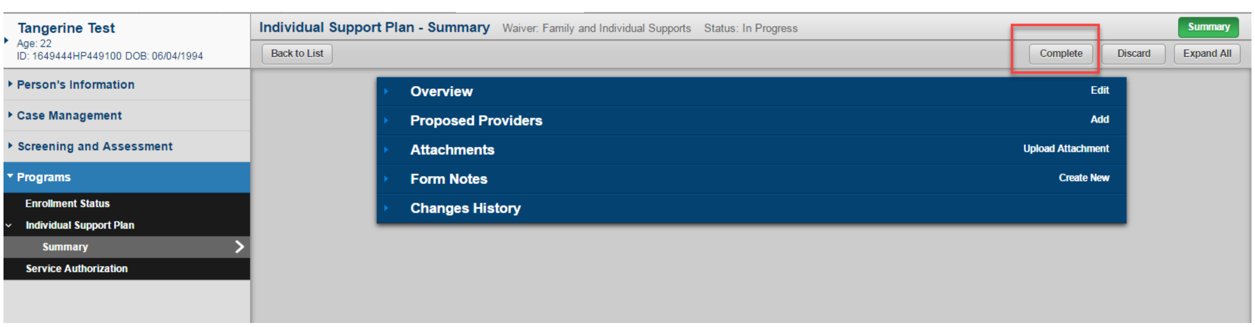


13.2.8 Complete an ISP

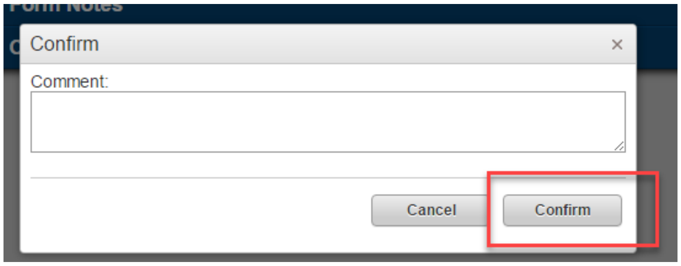
1. Navigate to Personal Summary (Click People tab -> Search -> click Summary)
2. Under Programs, select Individual Support Plan
3. Click on Summary of ISP to be completed
4. Complete each section of ISP



5. Click Complete button



6. Click Confirm

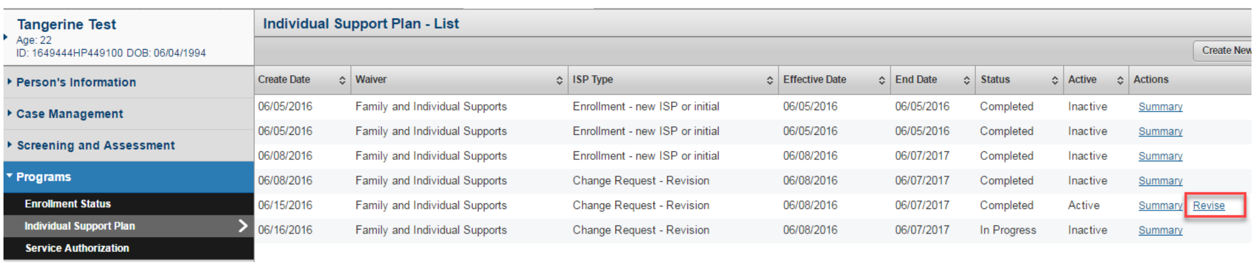


Tip:

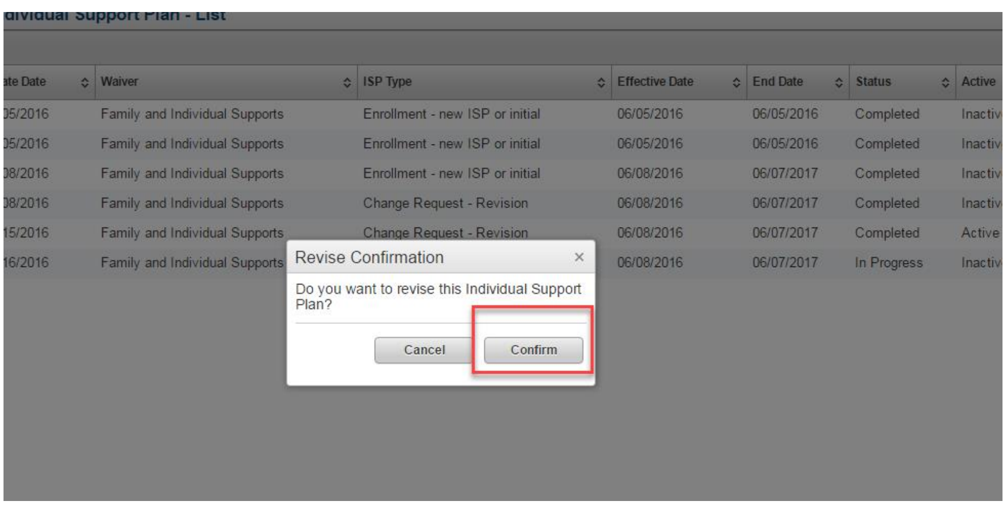
- An old ISP is marked “inactive” on the day the revised ISP goes into effect
- When a slot is released, all ISPs under the person become inactive and ISP end date becomes date of slot released

13.2.9 Revise an ISP

1. Navigate to Personal Summary (Click People tab -> Search -> click Summary)
2. Under Programs, select Individual Support Plan
3. Under the Actions column, click Revise



4. Click Confirm button and make necessary revisions- all information from the previous ISP will be pulled forward to the new ISP

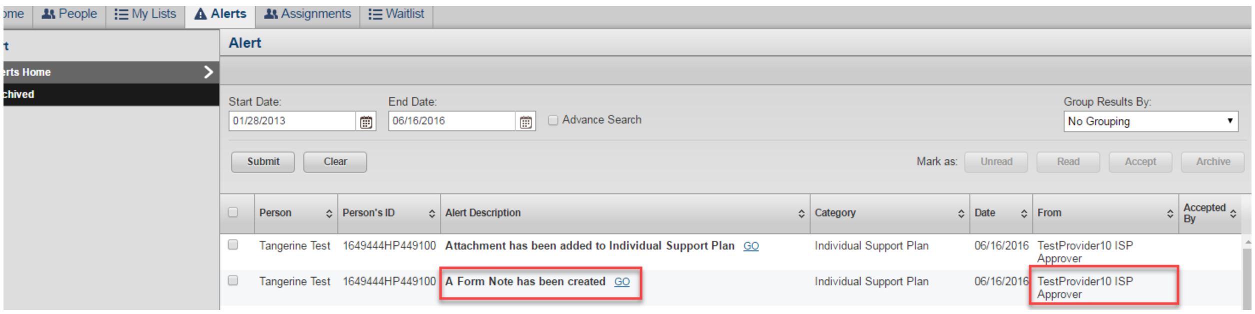


Tip:

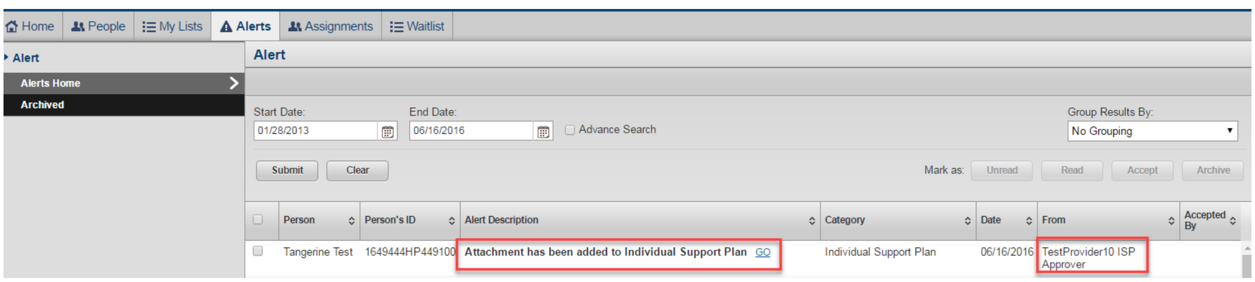
- An old ISP is marked “inactive” on the day the revised ISP goes into effect
- Different ISP Type choices are available when revising the ISP

13.2.10 Alerts that CSB/SC Receives

1. A Form note has been created



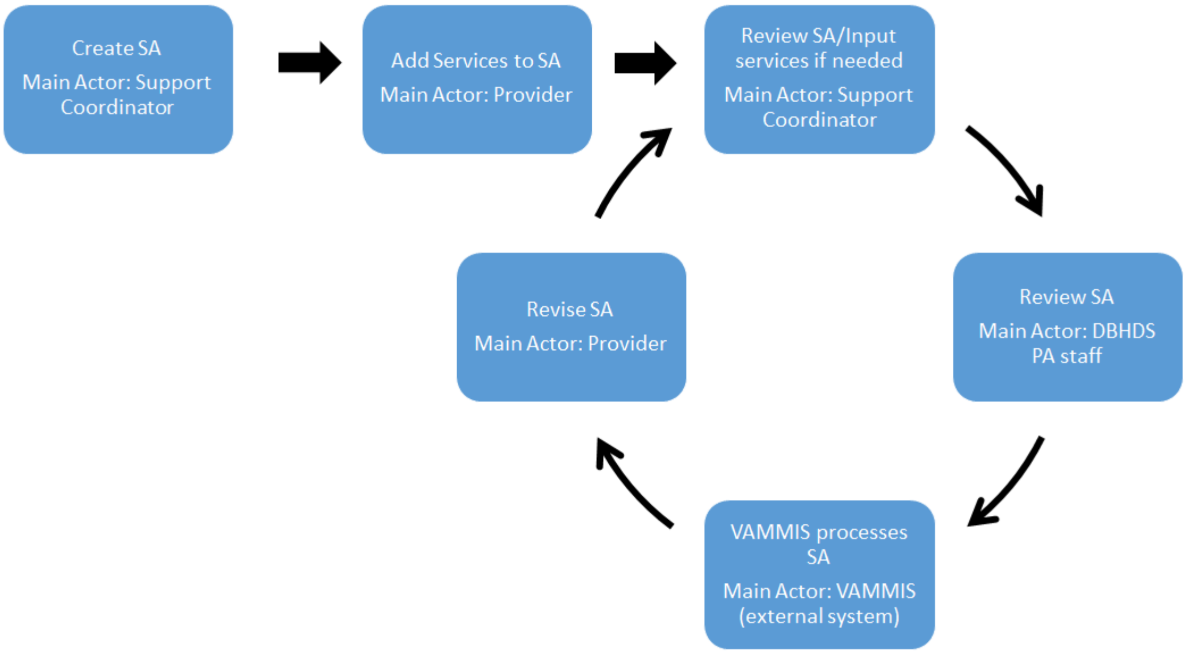
2. Attachment has been added to Individual Support Plan



3. Attachment has been removed from Individual Support Plan

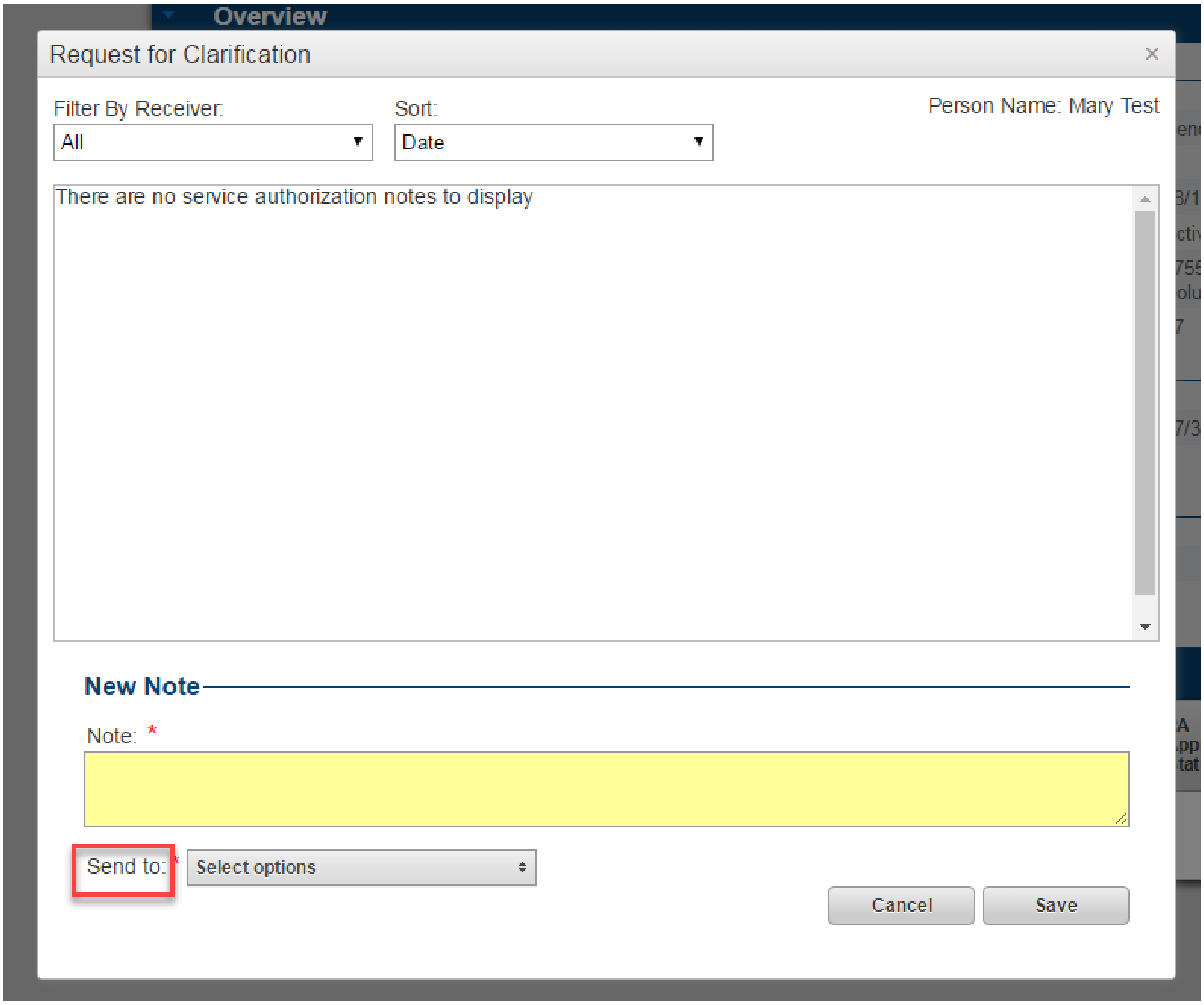
13.3 Service Authorization

The overall process for the Service Authorization (SA) is below.



Notes can be viewed/entered at any time by selecting the Note button from the Summary page

The “Send To” option will alert a member of the selected organization(s) that a note has been entered related to the Service Authorization



13.3.1 Create a Service Authorization

Purpose of This Function

Service Authorizations (SA) may be created, edited and submitted for provider services.

Who Can Use This Function

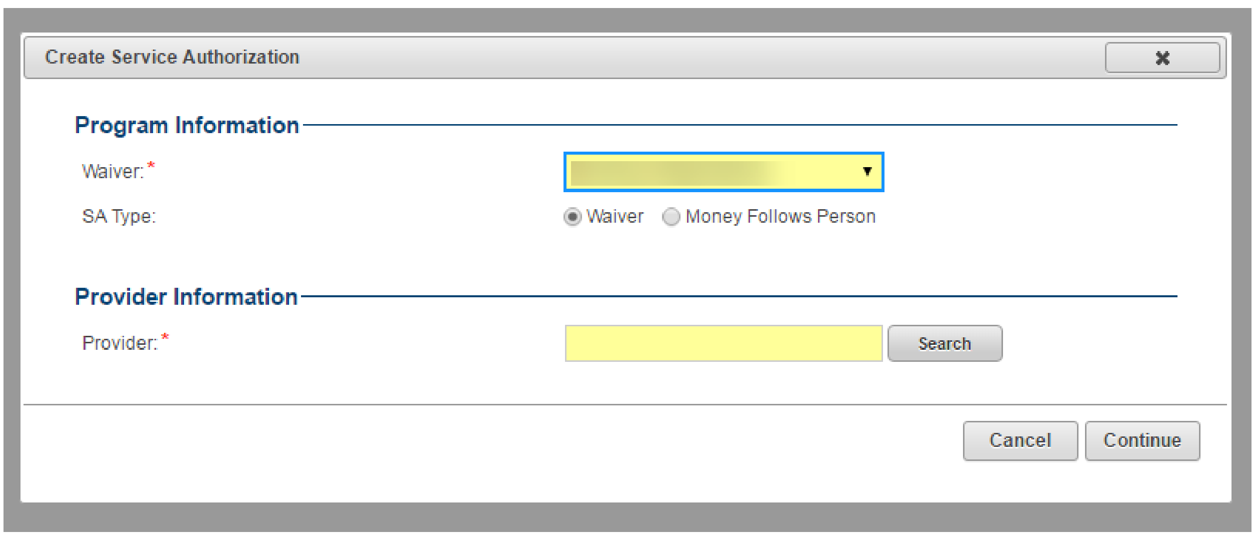
CSB

How to Use This Function

Note: Prior to this the following would have occurred:

- Profile created (See: Personal Information)
- VIDES submitted and LOF for DD Waiver Met (See: VIDES)
- Individual put on Waitlist and Wave Created (See: Waitlist)
- Slot has been assigned by DBHDS

1. Navigate to the Service Authorization List page for an individual (People tab -> Search -> Summary -> Programs -> Service Authorization)
2. Select Create New- a popup will display to select the Waiver, SA type (Waiver or MFP), and Provider
    a. The waiver type will default to the waiver type of the slot
    b. Search for a provider by using the Search button. Once found click Select and the chosen provider will populate
    c. Select Continue to complete the process



3. Once created, the provider can now input services- the status will show Pending Provider Input

Tips:

- A slot must be assigned to the person before a Service Authorization (SA) can be created

13.3.2 Review Service Line Item(s)/ Add Service Line Item(s) - if needed

Purpose of This Function

Review service details input by the provider and add service details based on the Waiver type if needed

Who Can Use This Function

DBHDS, CSB

How to Use This Function

1. Access the Service Authorization Details Overview page
2. Select Review link in the Actions column
3. Review the information entered and edit if necessary
4. Enter a Review Date and click Save- WaMS will redirect to the Service Authorization- Summary page

If it is necessary to add a service line to the Service Authorization:

5. Next to Service Details on the Service Authorization-Summary page, click Add
6. Complete required fields in Service Detail Information section
    a. Service – select from drop-down
    b. Review Date
    c. Requested:
        i. Start date – may not be back dated unless the service has a post-authorization flag
        ii. End date – may not be back dated unless the service has a post-authorization flag
        iii. Units – Once input, WaMS will automatically calculate the MMIS Units.
7. Click Save to view details of the new addition
8. Additional actions that may be completed:
    a. Add – add another Service
    b. By Service (whether entered by a provider or Support Coordinator)
        i. View
        ii. Edit
        iii. Delete

13.3.3 Submit the Service Authorization for Review

1. Click Submit for Review once all needed actions have been completed

Tips:

- All service lines must be reviewed by the Support Coordinator before it can be submitted for review to the PA Staff
- A Service Authorization can only have 18 service lines. After 18 lines, the system will automatically create a new Service Authorization
- Submit for Review must be clicked to send the SA to the PA Staff for review

- Once a Service Authorization is submitted for review, it cannot be deleted

2. Service Authorization – Summary title bar reflects Status: Pending PA Staff Review

13.3.4 View Service Authorization

Purpose of This Function

View a Service Authorization

Who Can Use This Function

Any WaMS User

How to Use This Function

1. Navigate to the Service Authorization – List (People tab -> Search -> Summary -> Programs -> Service Authorization)

Tip:
- This is also accessible through My List -> Service Authorization

2. Click View to see the Overview and Service Details

Tip:
- Providers can only see Service Authorizations their Organization Unit is providing services for

14 My Lists

14.1 Enrollment

Purpose of This Function

Easily view individuals in a specified waiver, status and CSB assignment

Who Can Use This Function

DBHDS, CSB

Providers (view only)

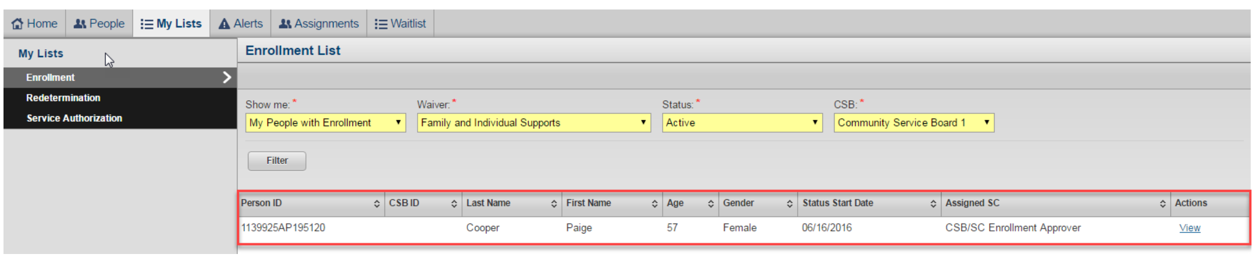
How to Use This Function

1. Access the Enrollment List Page (My Lists tab -> Enrollment)

2. Complete required fields:
    a. Show Me – My people with enrollment or (all) People with Enrollment
    b. Waiver – identify the waiver
    c. Status – identify the status
    d. CSB – identify the CSB

Tips:
- CSBs are only able to view their CSB OU
- DBHDS is able to view all CSB OUs

3. Click Filter



4. Click View to access the Person's Information Personal Summary window

14.2 Individual Support Plan

Purpose of This Function

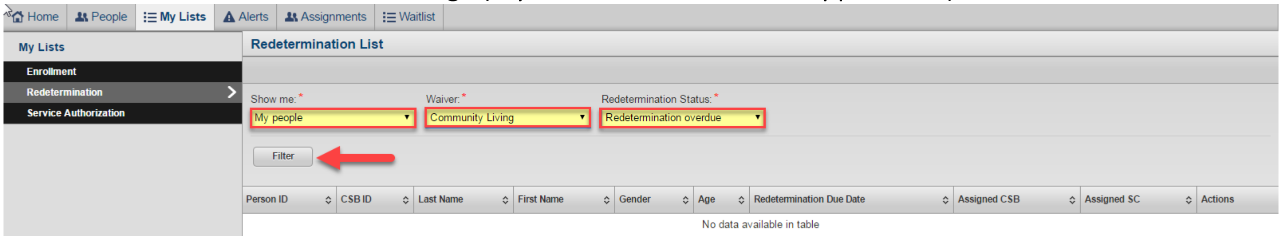
Easily view individuals with an Individual Support Plan

Who Can Use This Function

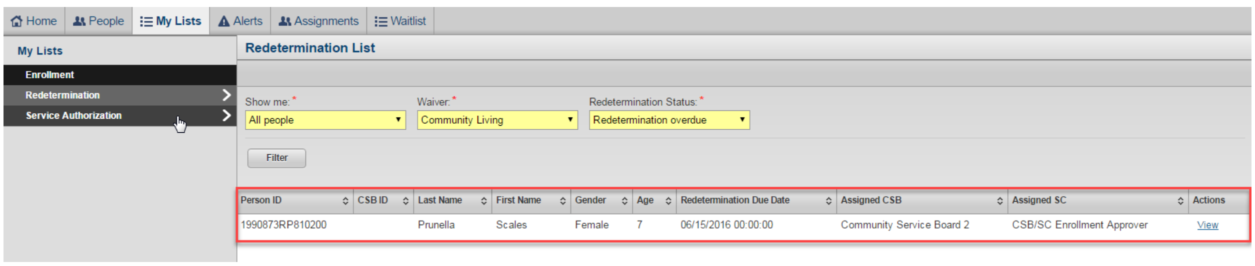
DBHDS, CSB

How to Use This Function

1. Access the Enrollment List Page (My Lists tab -> Individual Support Plan)



2. Complete required fields:
    e. Show Me – My people or All People
    f. Waiver – identify the waiver
    g. Annual ISP Status – Annual ISP overdue or Annual ISP due in X days
        i. A required Due in Days field pops up if Annual ISP due in X days is selected



3. Click View to access the Person's Information Personal Summary window and scroll to Enrollment Information for specific ISP information

14.3 Service Authorization

Purpose of This Function

Easily view individuals Service Authorization

Who Can Use This Function

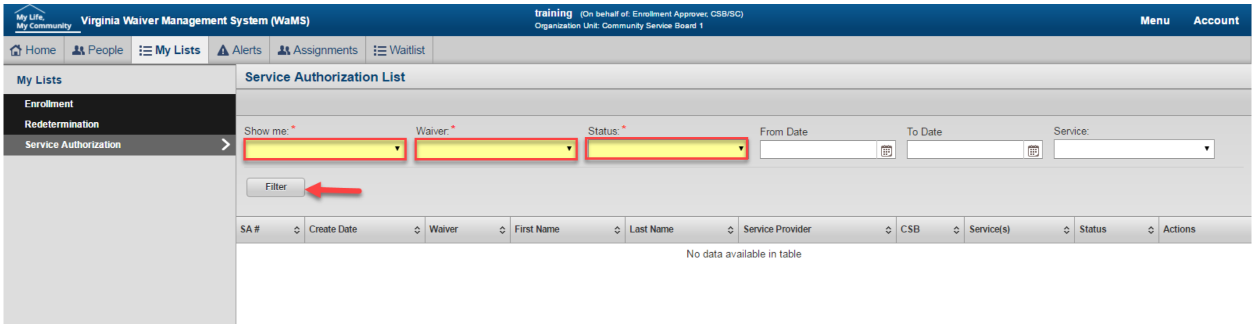
DBHDS, CSB

How to Use This Function

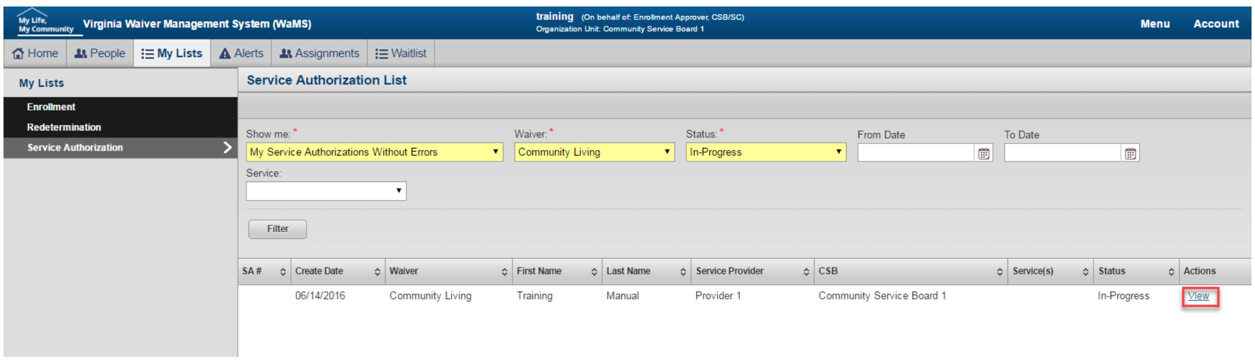
1. Access the Service Authorization List Page (My Lists tab -> Service Authorization)
2. Complete required fields:
    a. Show Me- My Service Authorizations without Errors, My Service Authorizations with Errors, All Service Authorizations without Errors, All Service Authorizations with Errors

b. Waiver – identify the waiver

c. Status- In-Progress, Under Review, Under Processing, Processed



3. Click Filter
4. Click View to access the person's Service Authorization



15 Waitlist

15.1 Adding A Person to the Waitlist

Purpose of This Function

Add a Person to the Waitlist

Who Can Use This Function

DBHDS, CSB

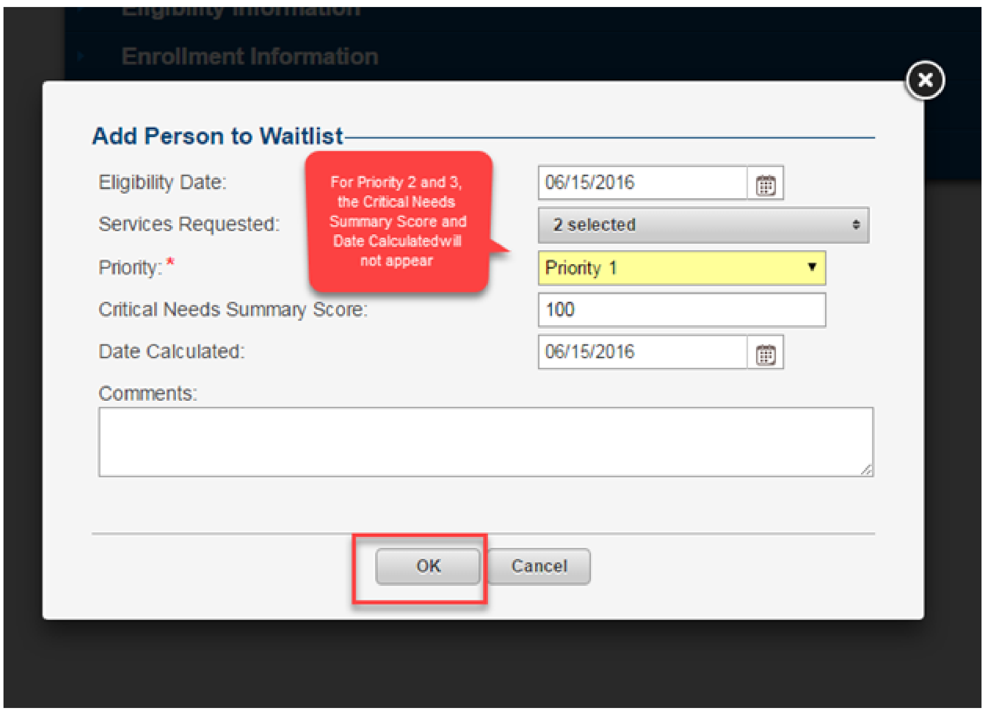
How to Use This Function

Note: A Person may be added to the Waitlist one of two ways:

- Access the Overview page and scroll to the bottom, click Add to Program
- In the People tab Search results, click Add to Waitlist on the far right of the Person's name

1. Click on Add to Waitlist to access the Add Person to Waitlist pop-up
2. Complete the required Priority field, identifying Priority 1, 2 or 3
    a. Priority 1 – input Critical Needs Summary Score
3. Complete optional fields
4. Click OK

Tips:
- The Critical Needs Summary Score and Date Calculated fields are only available for Priority 1 waitlist individuals
- Input of Critical Needs score is recommended. The score prioritizes the individual.
- Priority 1 individuals without a Critical Needs Summary Score are at the bottom of that prioritization list



15.2 Waitlist View

Purpose of This Function

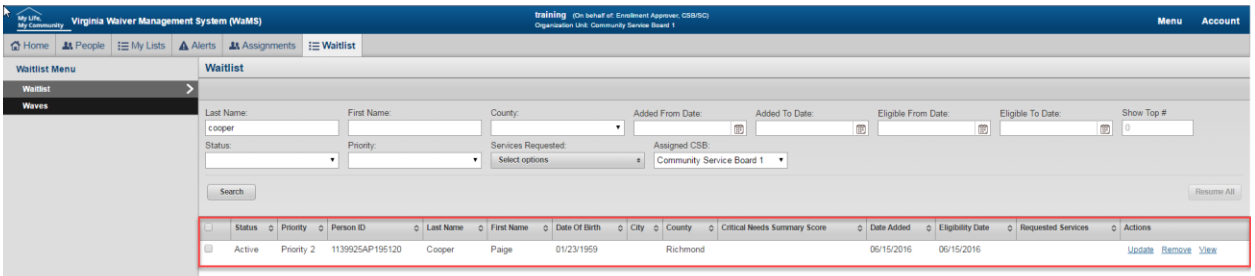
View Person’s on the Waitlist

Who Can Use This Function

DBHDS, CSB, DMAS

How to Use This Function

1. Access the Waitlist tab and Waitlist from the Waitlist Navigation Menu
2. Search for a person on the waitlist by inputting search criteria and clicking Search
    a. More search criteria input yields narrower search results



Tip:

- Critical Needs Summary Score is provided only for Priority 1 and is input by the CSB at the time of priority assignment

15.3 Update / Remove the Waitlist

Purpose of This Function

Update the Waitlist priority or remove the individual from the Waitlist

Who Can Use This Function

DBHDS, CSB, DMAS

How to Use This Function

Note: Individuals must have a status of Active in order to Update or Remove them from waitlist

1. Access the Waitlist Tab from Navigation Menu
2. Enter valid criteria and click Search. Input of more search criteria yields narrower results
3. Click Update or Remove to the right of the individual's information
    a. Update the individual's Priority if applicable
        i. If Priority 1 – update the Critical Needs Summary Score

Tips:
- The Critical Needs Summary Score and Date Calculated fields are available and updated or populated with new information for Priority 1 waitlist individuals only
- Input of Critical Needs Summary Score is recommended. The score prioritizes the individual.
- Priority 1 individuals without a Critical Needs Summary Score are at the bottom of that prioritization list

4. Click OK

15.4 Wave View

Purpose of This Function

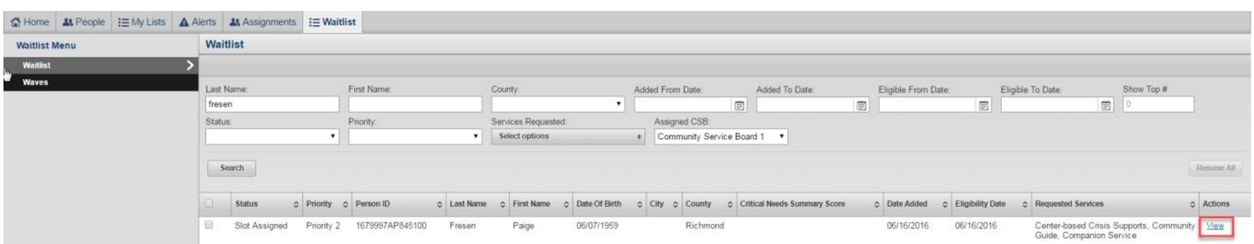
View Wave

Who Can Use This Function

CSB, DMAS

How to Use This Function

1. Access the Waitlist Tab and Waves from the Waitlist Navigation Menu
2. Enter valid criteria and click Search. Input of more search criteria yields narrower results
3. Click View to the right of the selected Wave



Tip:
- Only Waves with an In Progress or Pending status will have additional information to view

4. Click the box to the left of the desired individual and click on the desired action:
   a. Deactivate – the individual has been moved to an Inactive status
5. Receive message of action success