Department of Behavioral Health and Developmental Services

Virginia

Waver Management System

CSB Navigation Manual

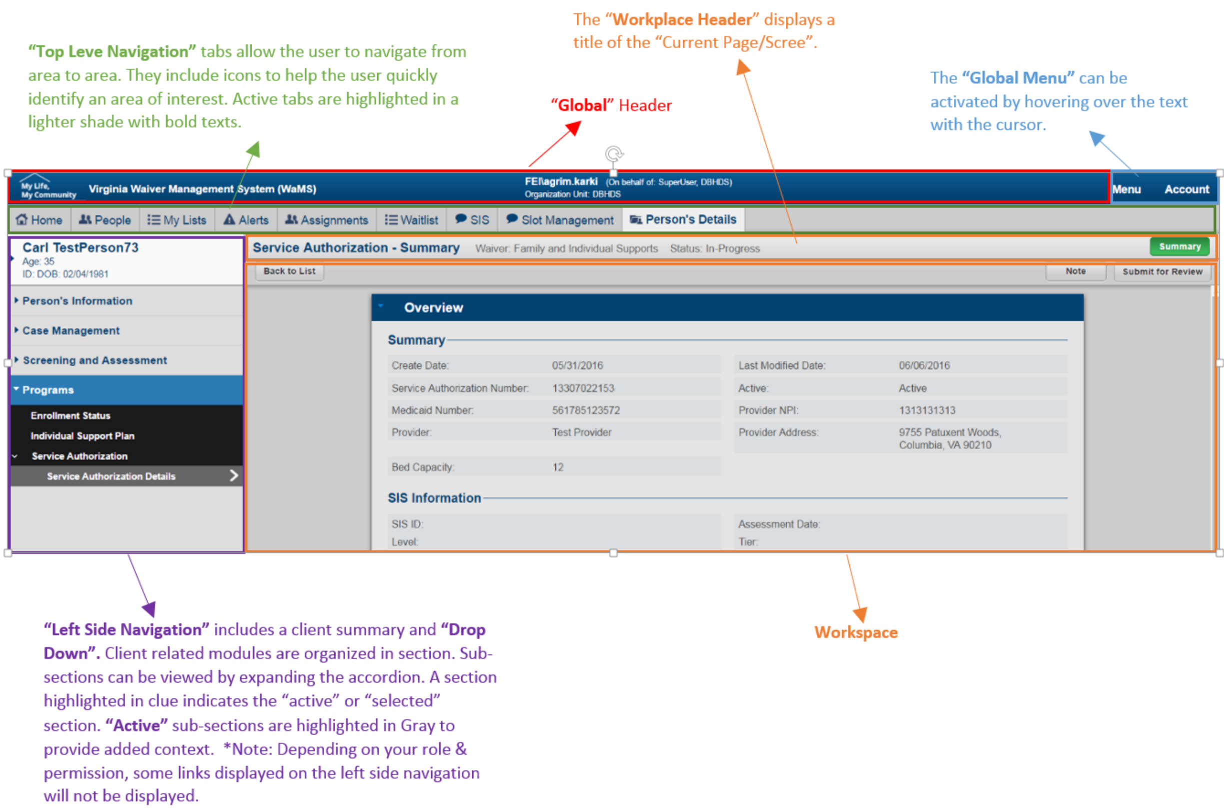
July 1, 2016

Waver Management System

1 Contents

2 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.



3 System-wide Controls

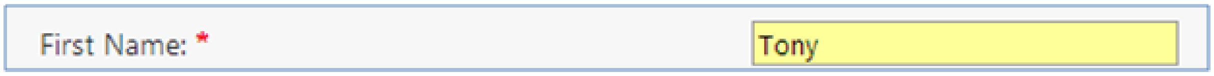
3.1 Input Fields

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

3.1.1 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.

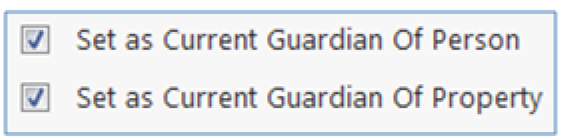


3.1.2 Drop-down Lists / Combo Boxes

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.

3.1.3 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.



3.1.4 Radio Buttons

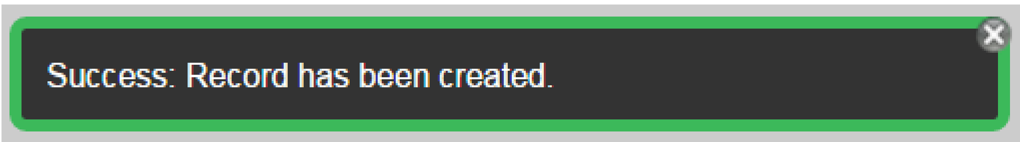
Radio buttons are used to select one option from a list of available options. To activate the radio button, click on the round button next to the desired option.

3.2 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.

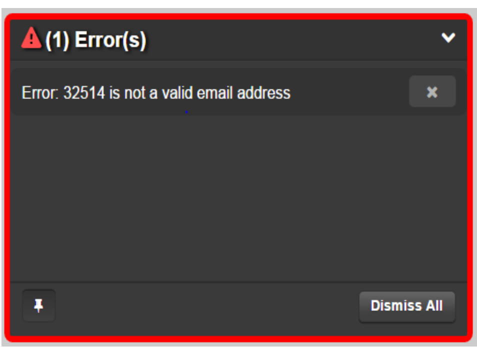
3.2.1 Success Messages

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



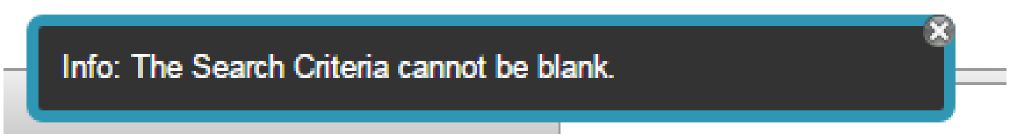
3.2.2 Error Messages

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



3.2.3 Information messages

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

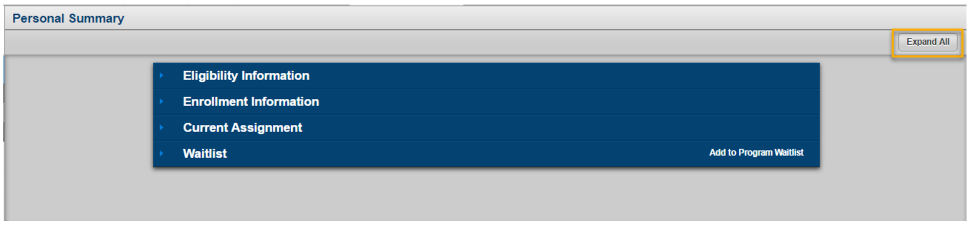


3.3 Buttons and Links

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.

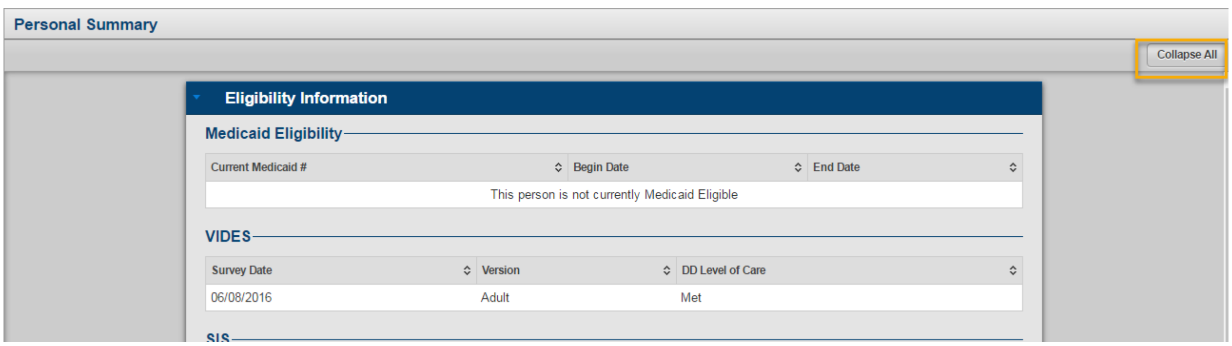
3.3.1 Expand All Button

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



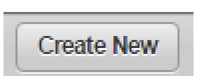
3.3.2 Collapse All Button

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



3.3.3 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.



3.3.4 Edit Button

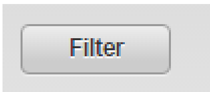
This button allows users to edit the form available in the main workspace. Edit is only available for certain forms.

3.3.5 Search Buttons

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

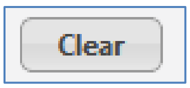
3.3.6 Filter Buttons

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



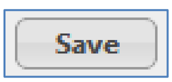
3.3.7 Clear Button

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



3.3.8 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.



3.3.9 Discard Button

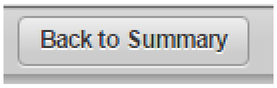
This button allows users to discard a form that was saved or submitted.

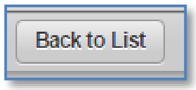
3.3.10 Submit Button

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.

3.3.11 Back To List/Back to Summary Link

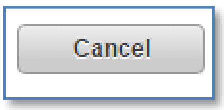
This link allows the user to go back to the previous list or summary screen when the current form does not have a cancel action (e.g. Task list)





3.3.12 Cancel Link

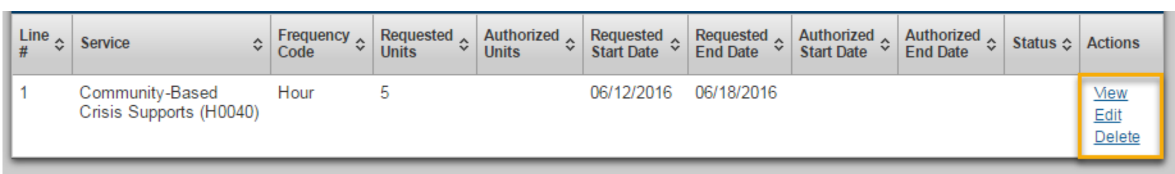
This link allows the user to cancel the current data entry and takes the user to the previous page without saving the information entered



3.4 Links

3.4.1 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

4 Login

4.1 How to Login

Purpose of This Function

Users must login to WaMS prior to having access.

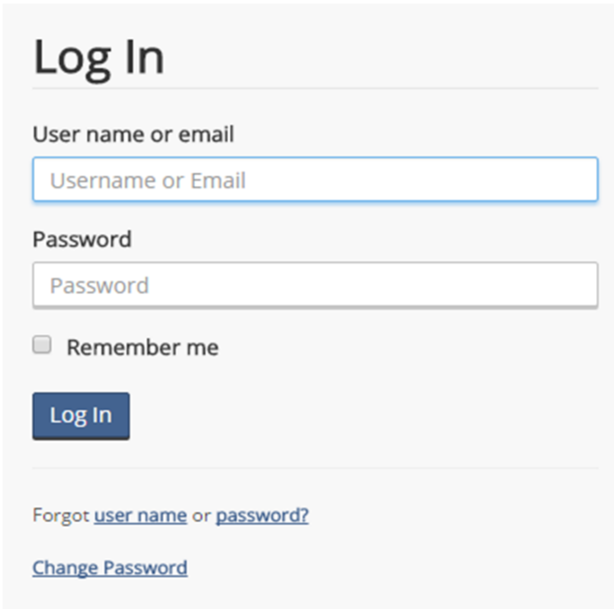
Who Can Use This Function

Any user of WaMS

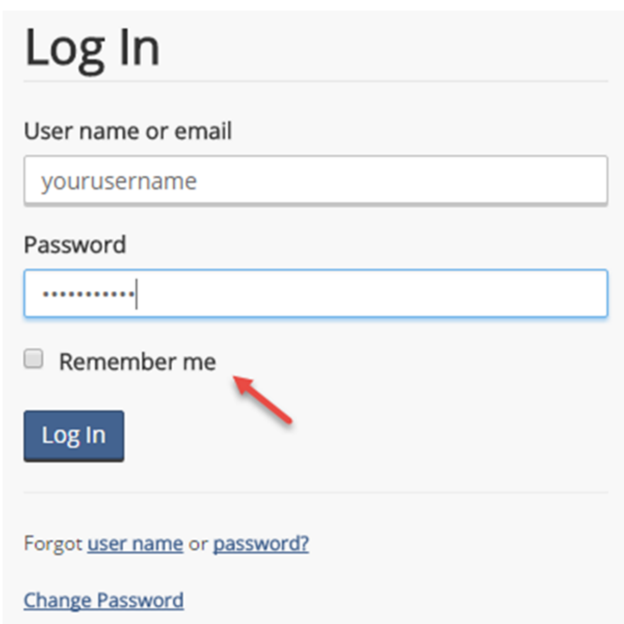
How to Use This Function

1. Go to https://wamsvirgina.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



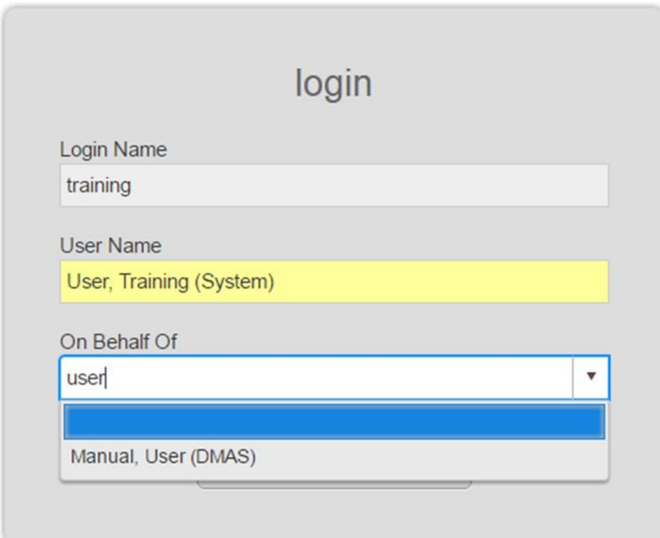
3. Enter the assigned Username or Email Address into the first field labelled 'User name or email'
4. Enter the chosen Password in the password field
5. The option to Remember Me will allow the user's information to be saved on this browser for later use, if desired



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.

4.2 Create New Password/Reset Forgotten Password

Purpose of This Function

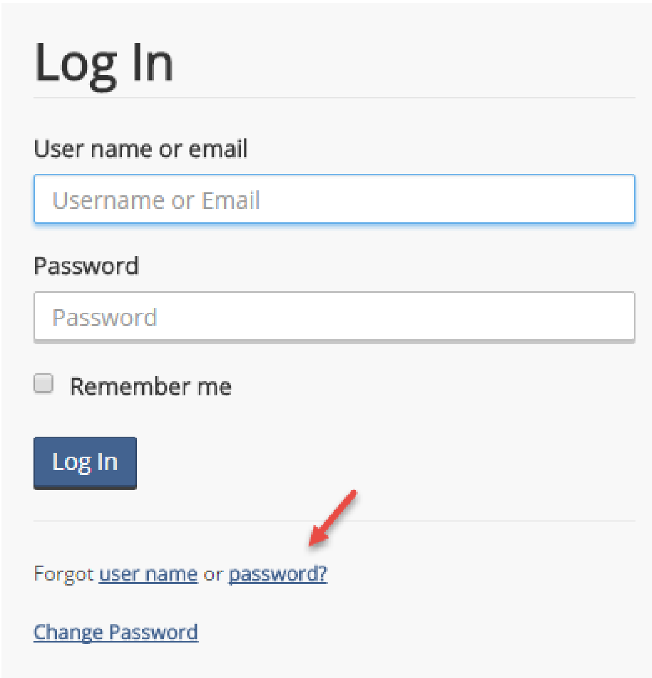
Creating a new password without having to enter the old password.

Who Can Use This Function

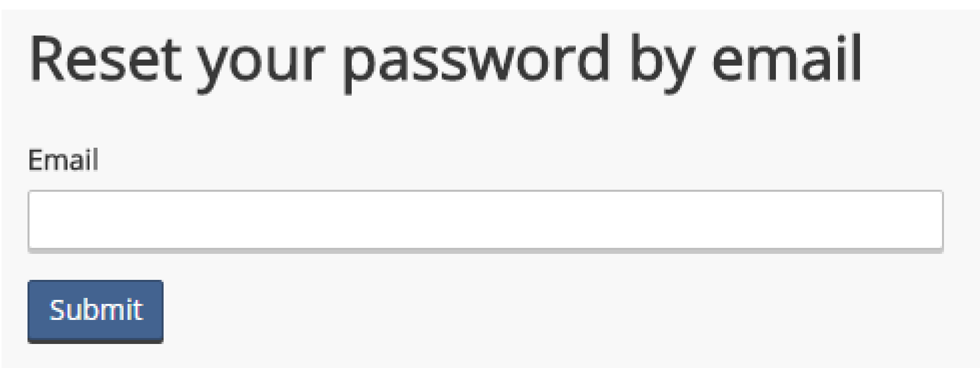
Any user of WaMS

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.

4.3 Change Password

Purpose of This Function

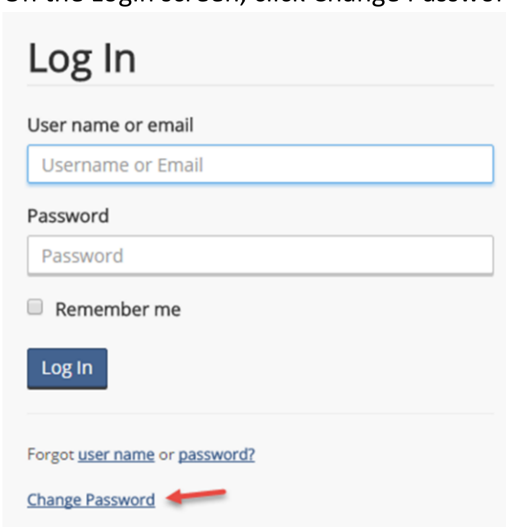
Change the password associated with username from one password to another.

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.

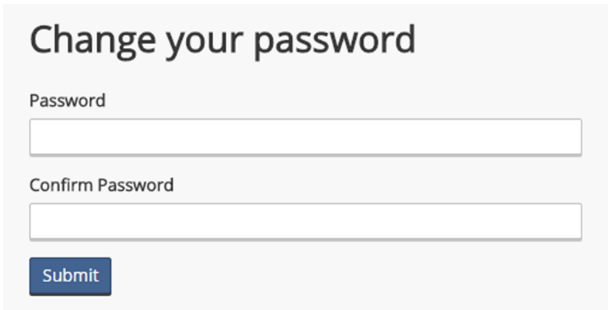


2. The user will be taken to a new screen labelled Change Password
3. In appropriate boxes, enter Username, Old Password, Password (new), and Confirm Password.

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



4.4 Forgot Username

Purpose of This Function

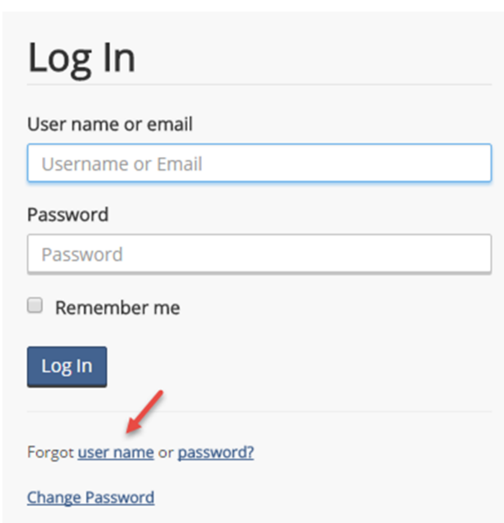
Email a forgotten Username to the user

Who Can Use This Function

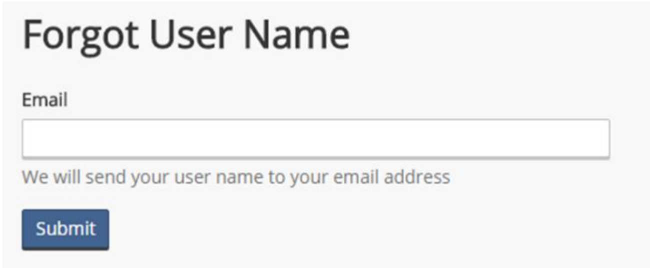
Any user of WaMS

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



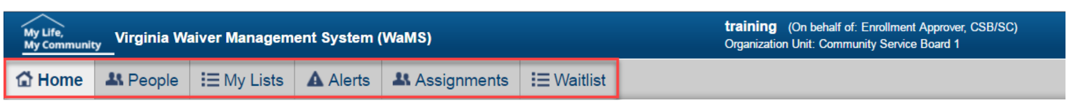
3. Enter Email Address associated with WaMS login
4. Click Submit
5. After successful submission, the username will be emailed to the email address entered

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

5 WaMS Top-Level Navigation

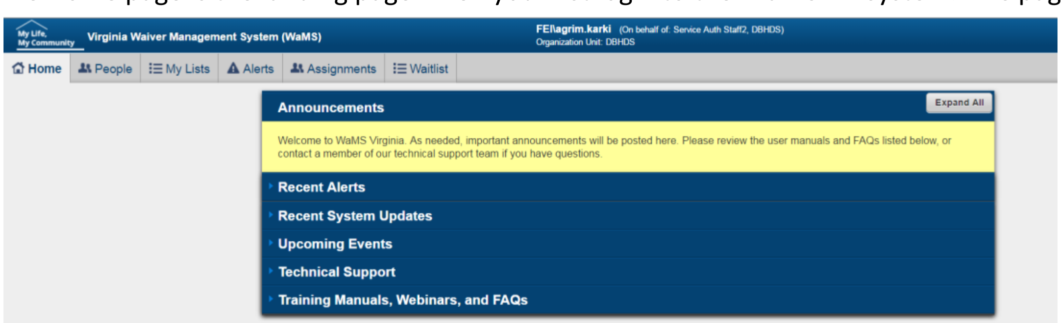
The top-level navigation is useful for high-level navigation through the system. The following tabs are included in the top-level navigation: Home, People, My Lists, Alerts, Assignments, Waitlist and Person Details.



Each of these tabs is described in detail below.

5.1 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:

5.1.1 Announcements

This section will provide the users important announcements as needed

5.1.2 Recent Alerts

This section describes systems alerts for WaMS

5.1.3 Recent System Updates

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

5.1.4 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

5.1.5 Technical Support

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

5.1.6 Training Manuals, Webinars, and FAQs

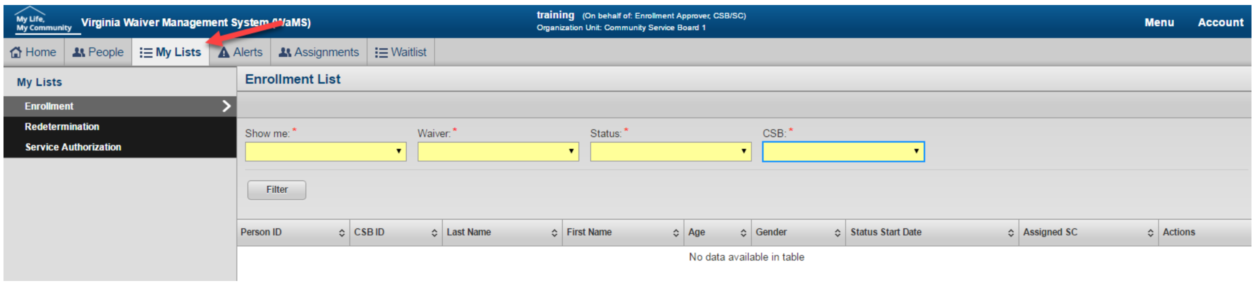
This section provides abundant detailed instructional materials, guides, presentations and video recordings on how to use the WaMS system. Materials will include user manuals (as mentioned in the introduction), recordings of webinars provided by topic (if applicable), and detailed additional information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

5.2 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.

5.3 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, Redeterminations status and Service Authorization status. The lists are available strictly based on the agency and role of the user logged in.

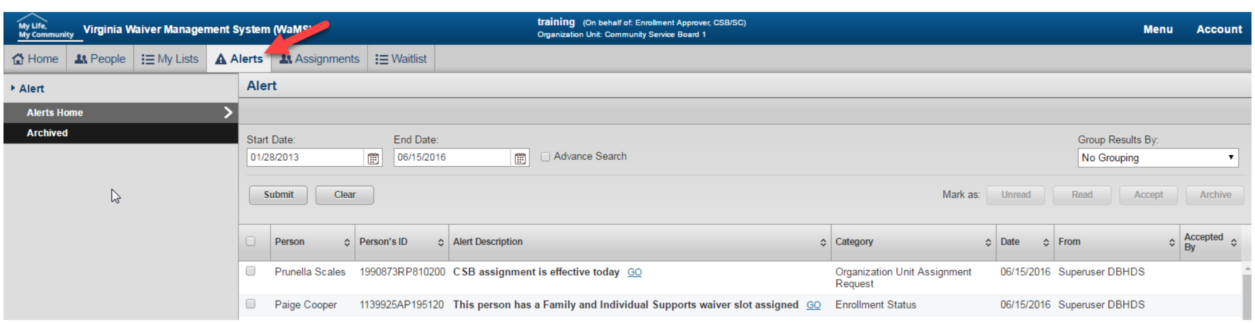


How to Use This Function

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

5.4 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

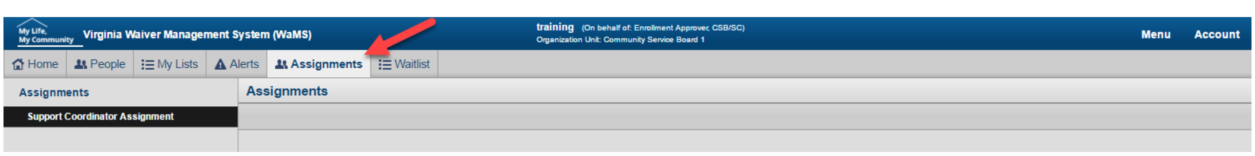
2. Selecting GO will open a new tab for the user to display the applicable page with more information about the alert

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. Redetermination 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. Redetermination for a client is due on (due date) 14. The person's assigned waiver slot (Slot Number) is released

5.5 Assignments

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

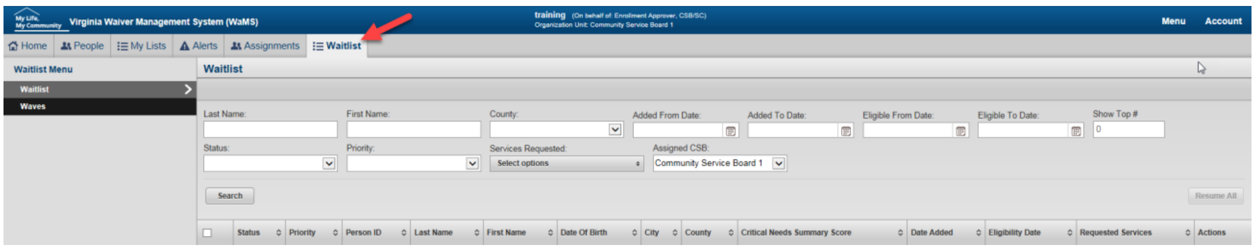


Tip:

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

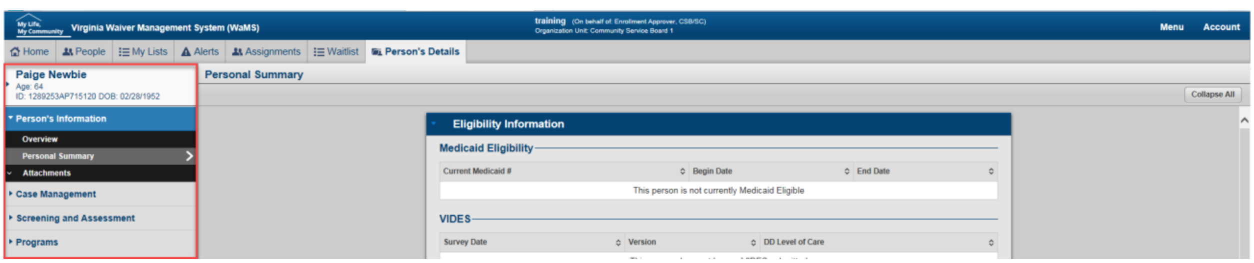
5.6 Waitlist

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.



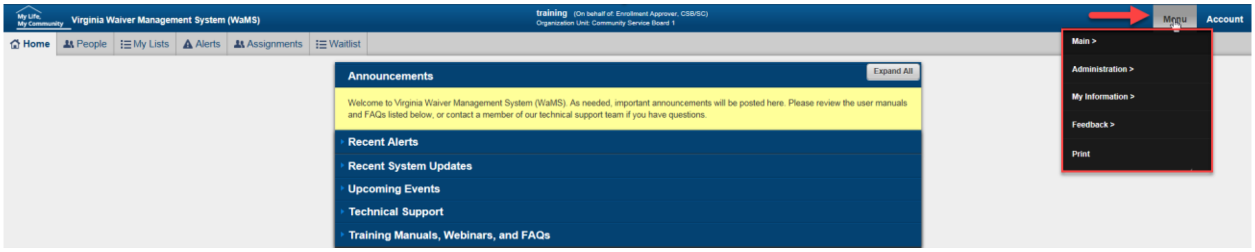
6 WaMS Left Side Navigation

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.



7 Global Menu

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



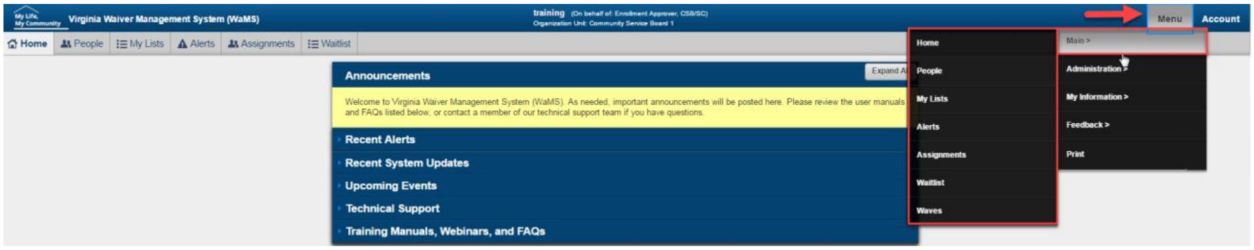
Global Menu has the following options. Any of the menu options with a rightward pointing arrow is in turn another menu. The menu options are available strictly based on the agency and role of the user logged in.

- Main
- Administration
- My Information
- Feedback
- Print

Each of these options is explained below in detail.

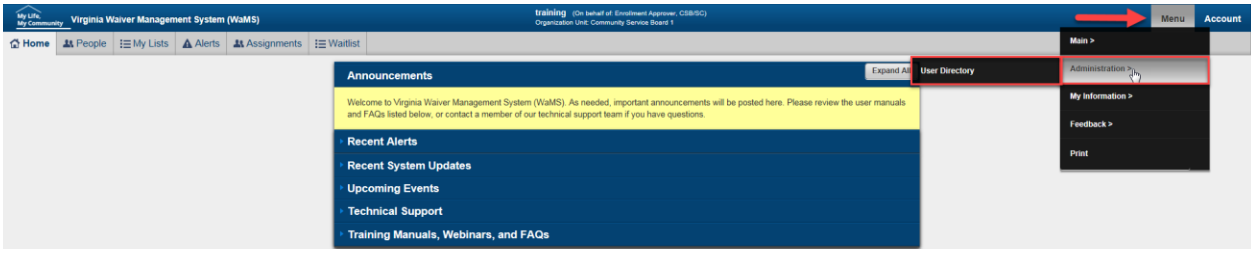
7.1 Main

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.



7.2 Administration

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

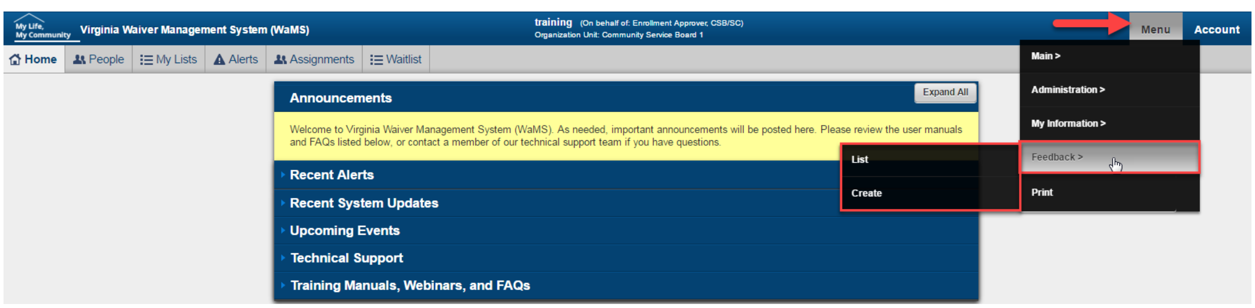


7.3 My Information

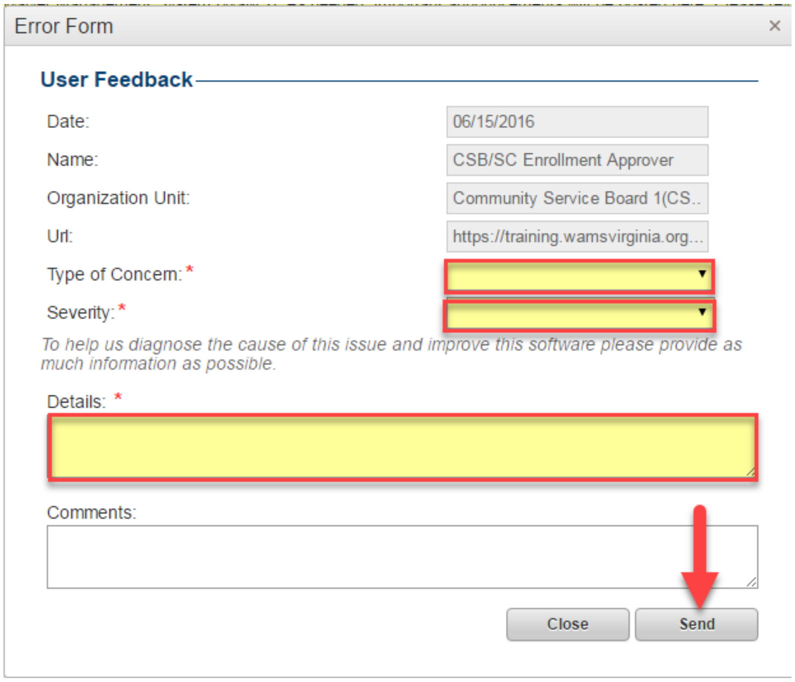
Click on Menu, then click on My Information to see the information on the user. (See: My Information)

7.4 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.



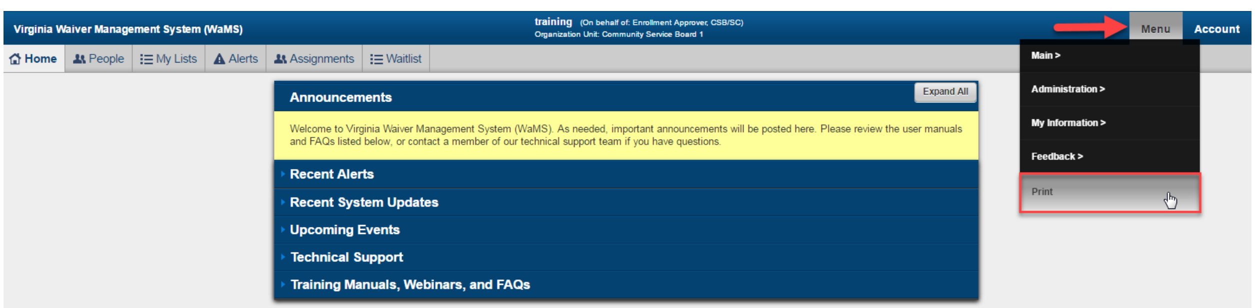
To enter feedback, select Create; the following popup will appear:



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

7.5 Print

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



8 User Directory

Purpose of This Function

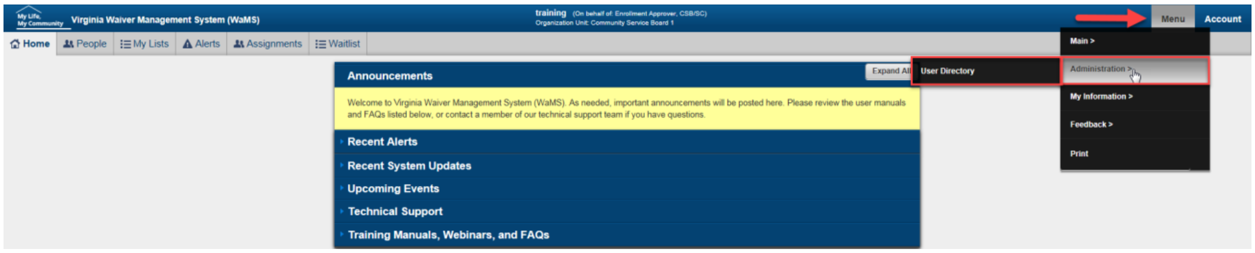
Search for and obtain information on any user in WaMS.

Who Can Use This Function

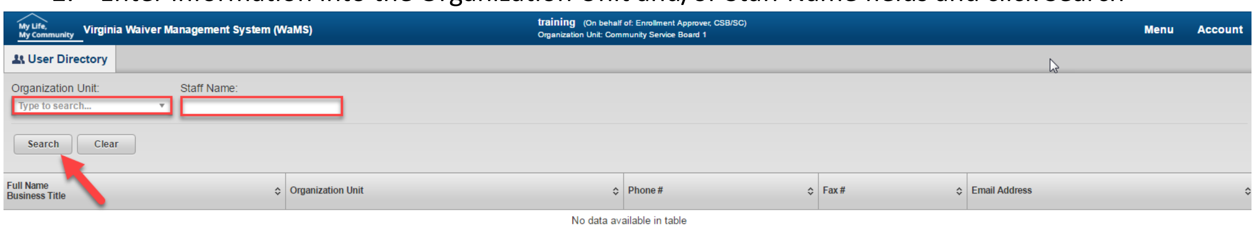
Any WaMS user

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

9 My Information

9.1 My Organization

Purpose of This Function

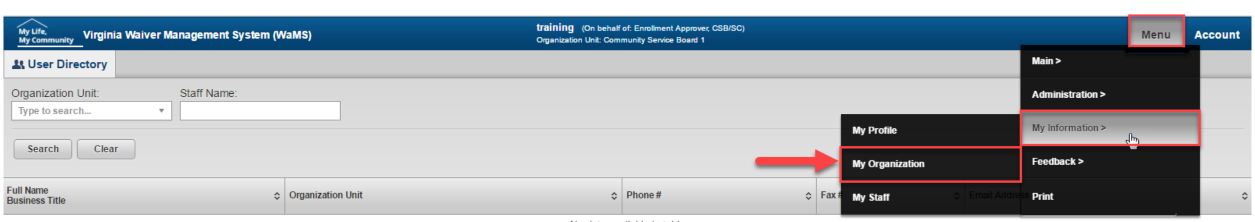
For the user to view the attributes of their organization

Who can Use This Function?

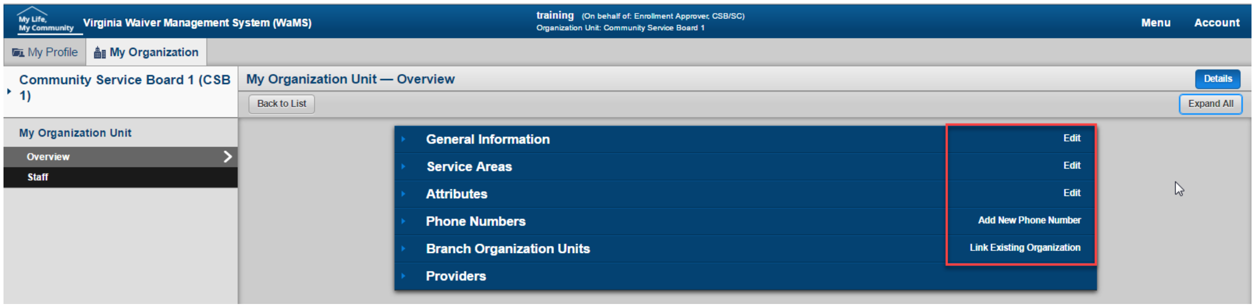
Any WaMS User

How to Use This Function

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



2. Update the organizations information as needed



9.2 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.

9.3 Create Staff

Purpose of This Function

Add Staff Profiles for new users of WaMS

Who Can Use This Function

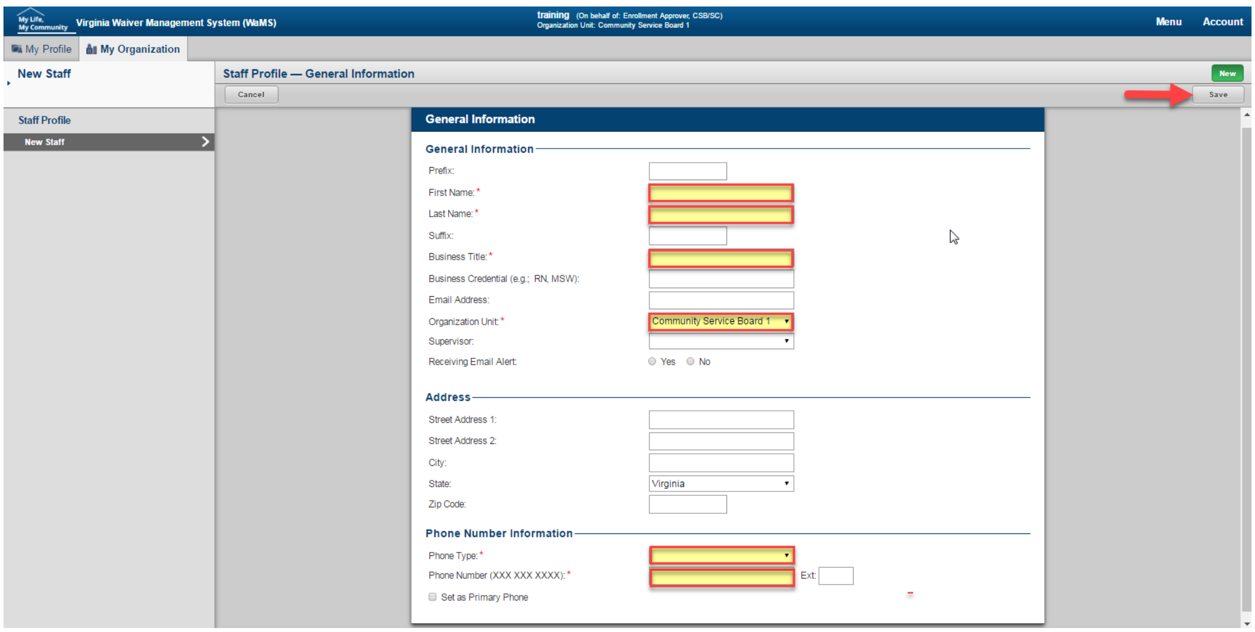
Any WaMS user

How to Use This Function

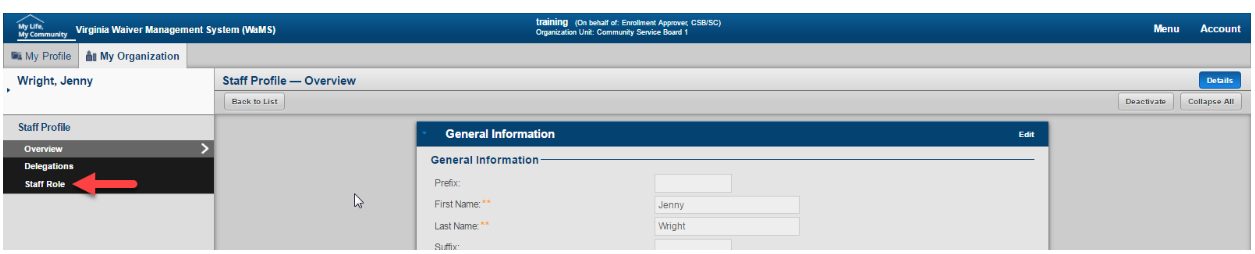
1. Navigate to the My Staff listing (See: My Information)

2. Click Create Staff on the right

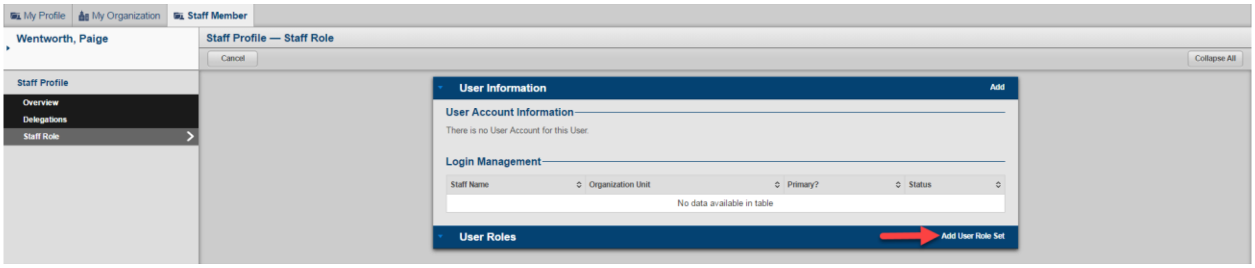
3. Complete required fields in the Staff Information
    a. Complete optional fields with known information
4. Click Save to generate Staff Profile



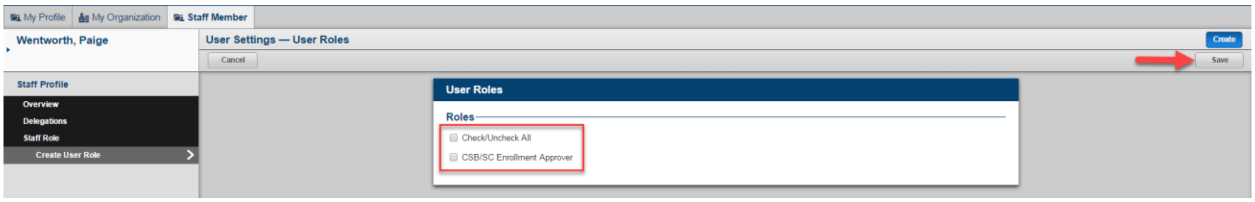
5. On the Left Navigation, click Staff Role



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

9.4 Edit Staff

Purpose of This Function

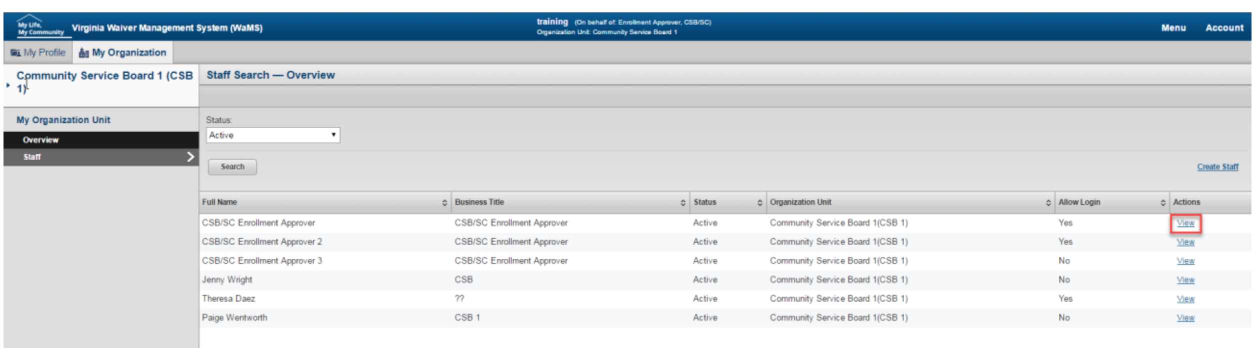
Update Staff Profiles for existing users of WaMS

Who Can Use This Function

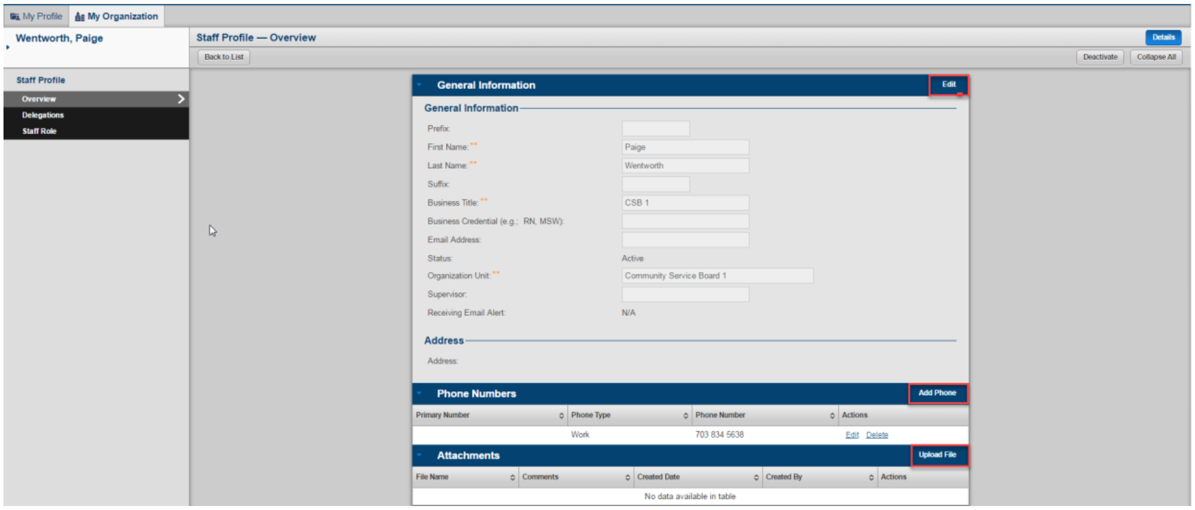
DBHDS, DMAS, CSB, Provider

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

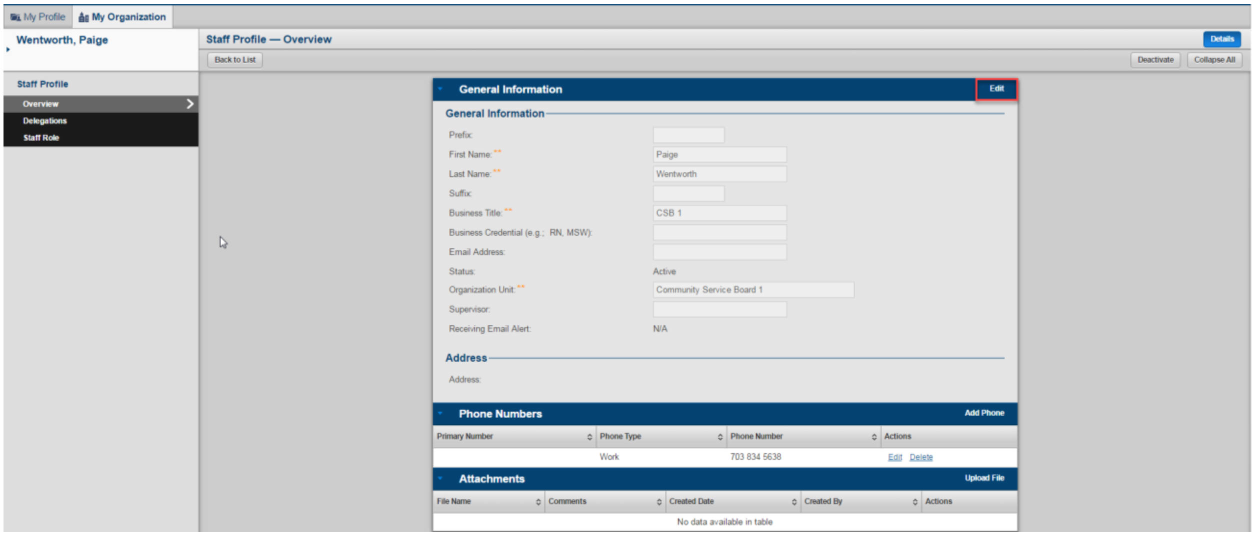


3. Click on the section to edit (edit information for each topic follows)

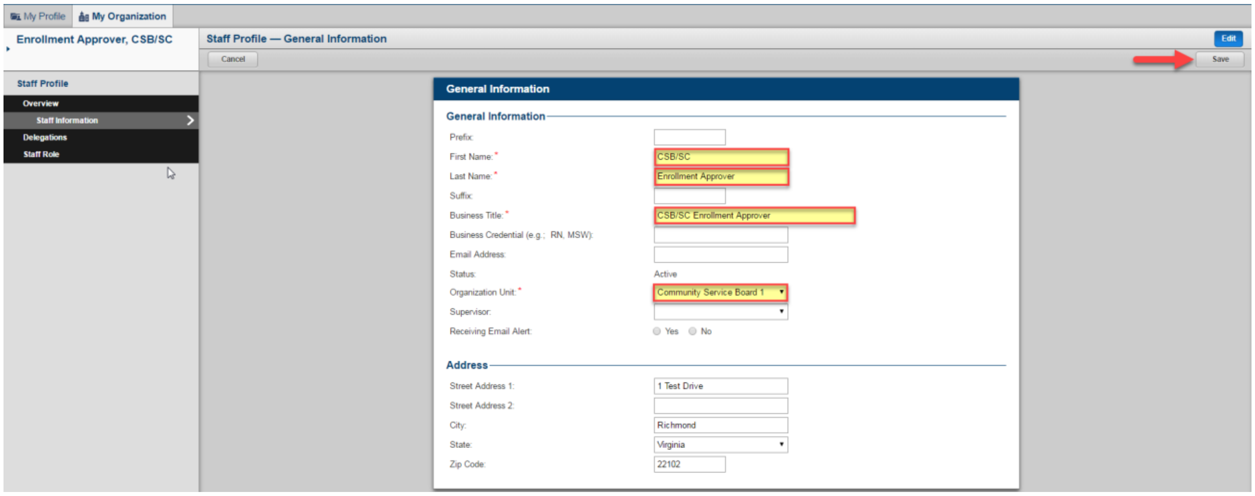


9.4.1 Edit General Information:

4. Click Edit in the General Information section



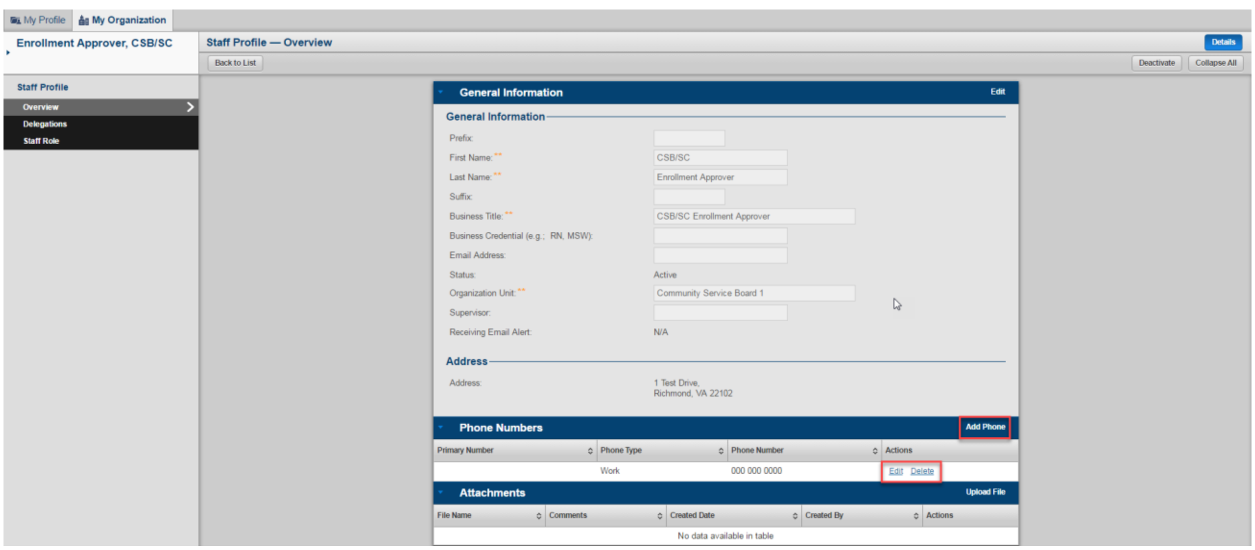
5. Complete edits to Staff Name, Title, Email, Credentials or Email Alert settings



6. Click Save to return to the General Information window

9.4.2 Add/Edit Phone Numbers:

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



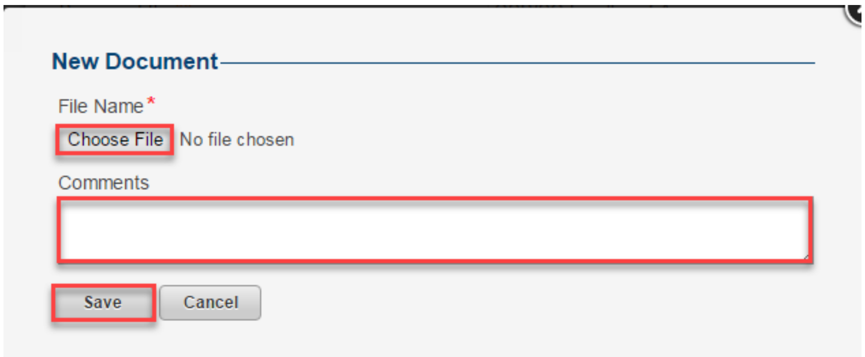
5. Click Save

9.4.3 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

9.4.4 Add Attachments to Staff Profile

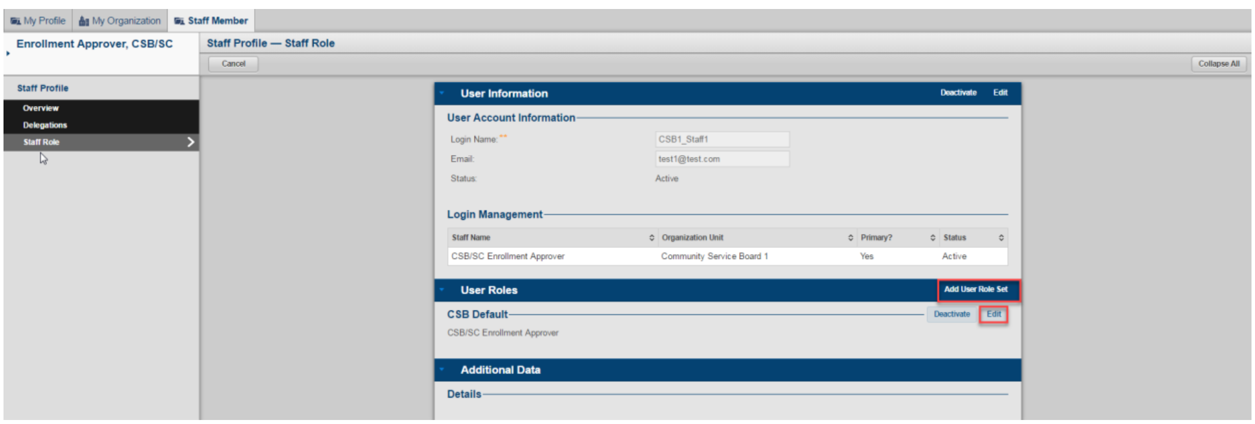
4. Click Upload File
5. Under File Name, Click Choose File



6. Enter any desired comments
7. Click Save

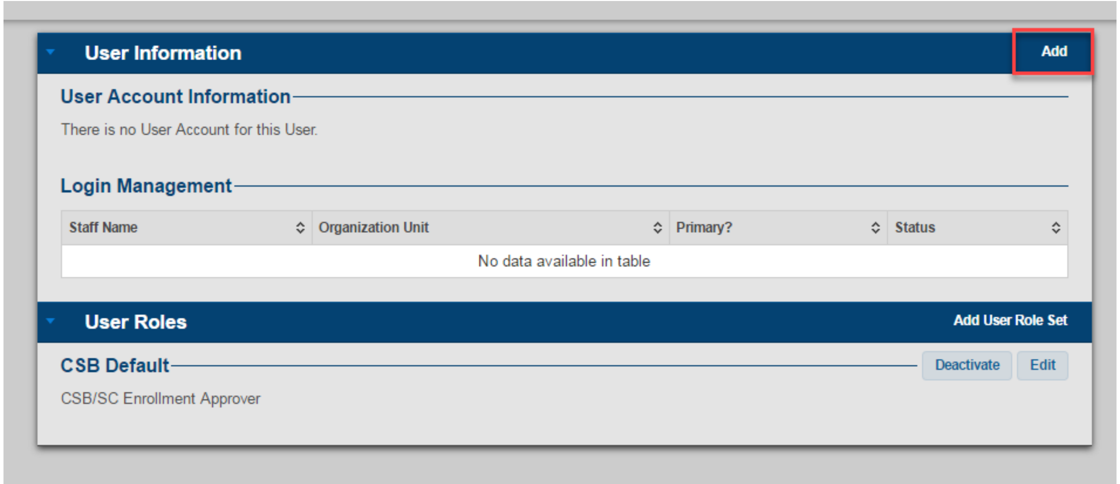
9.4.5 Add User Roles

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

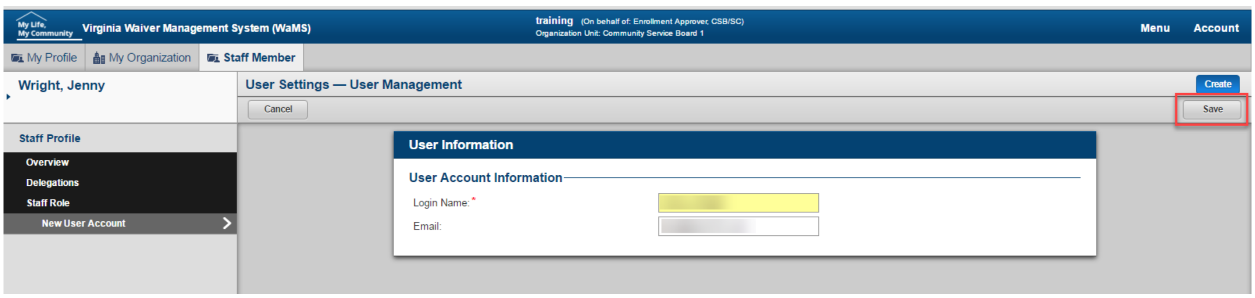


3. Select appropriate role(s) and click Save

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

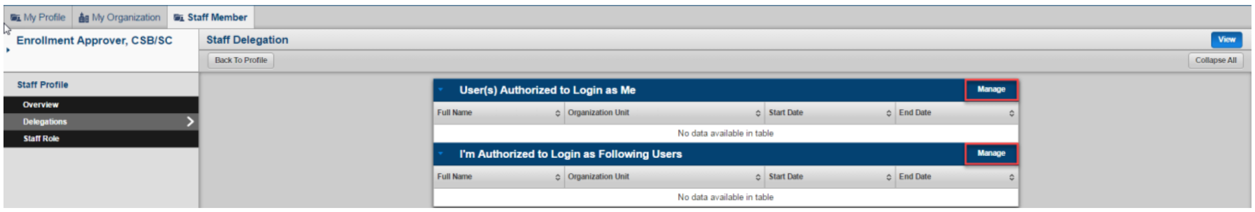
9.4.6 Edit User Roles

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

9.4.7 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.

9.4.8 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.

9.4.9 Deactivate Delegation(s)

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

9.5 My Profile

Purpose of This Function

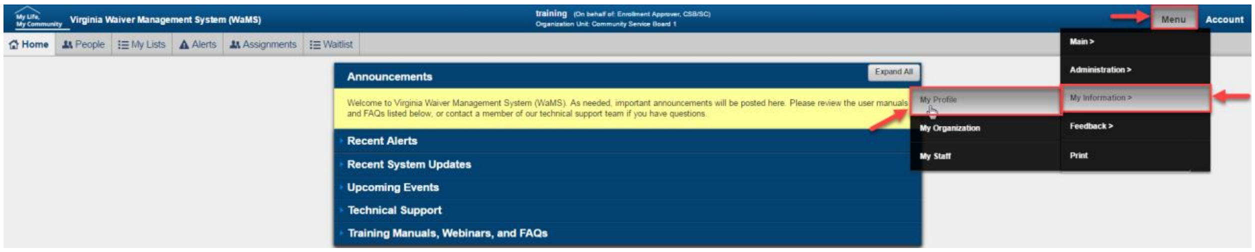
All WaMS users must have a Staff Profile to work within the Virginia Wavier Management System

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



10 Global Print

Purpose of This Function

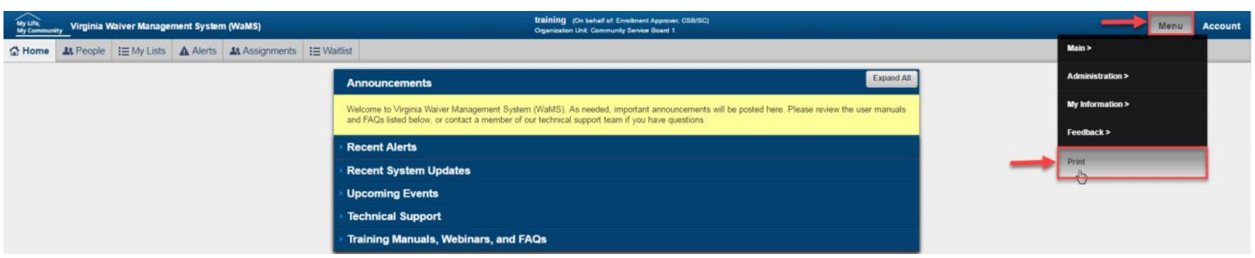
The Global Print allows user to create a PDF version of any page in WaMS for print or reference.

Who can Use This Function

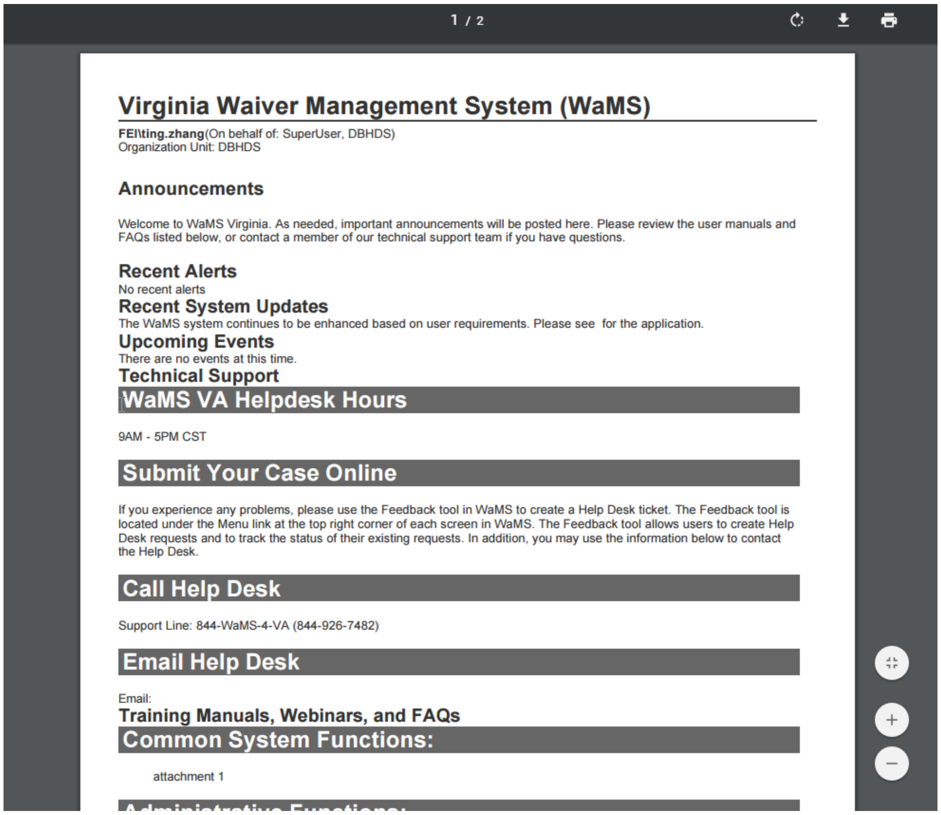
Any WaMS User

How to Use This Function

1. Navigate to Menu, select Print



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



1 / 2

Virginia Waiver Management System (WaMS)

FEI\ting.zhang(On behalf of: SuperUser, DBHDS)
Organization Unit: DBHDS

Announcements

Welcome to WaMS Virginia. As needed, important announcements will be posted here. Please review the user manuals and FAQs listed below, or contact a member of our technical support team if you have questions.

Recent Alerts
No recent alerts
Recent System Updates
The WaMS system continues to be enhanced based on user requirements. Please see for the application.
Upcoming Events
There are no events at this time.
Technical Support

WaMS VA Helpdesk Hours

9AM - 5PM CST

Submit Your Case Online

If you experience any problems, please use the Feedback tool in WaMS to create a Help Desk ticket. The Feedback tool is located under the Menu link at the top right corner of each screen in WaMS. The Feedback tool allows users to create Help Desk requests and to track the status of their existing requests. In addition, you may use the information below to contact the Help Desk.

Call Help Desk

Support Line: 844-WaMS-4-VA (844-926-7482)

Email Help Desk

Email:
Training Manuals, Webinars, and FAQs
Common System Functions:

attachment 1

11 Person's Information – People Tab

11.1 Search for an Individual

Purpose of This Function

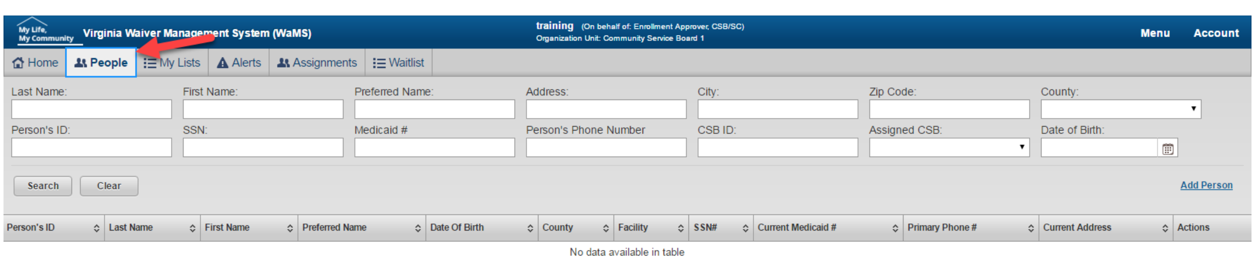
Locate the individual's profile or confirm that a profile does not exist

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 and click 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.

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

11.2 Create a New Profile

Purpose of This Function

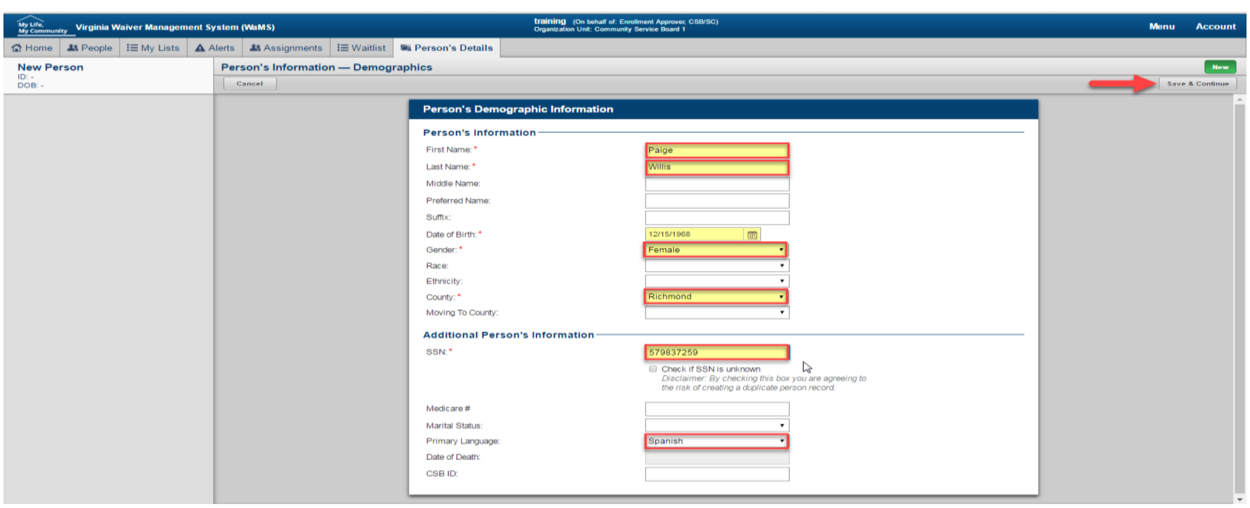
After verifying there is not an existing profile, use this process to create a new profile to begin the process for obtaining benefits

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

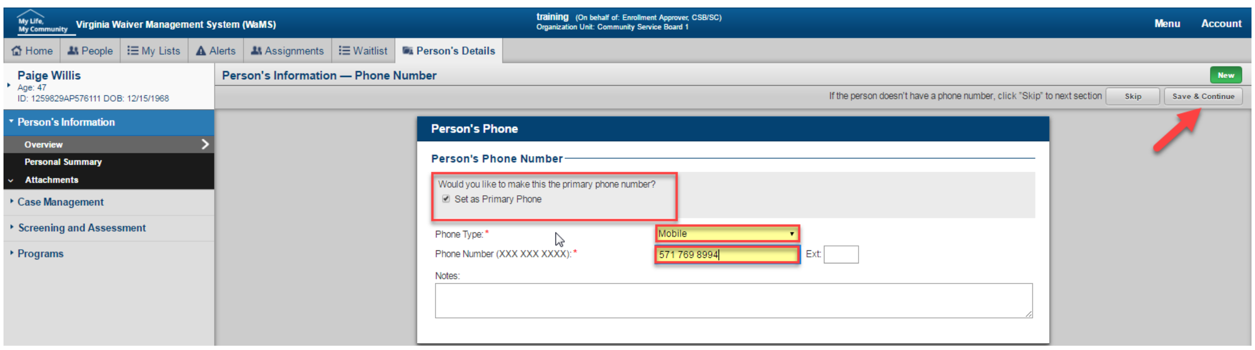


4. Click Save and Continue to receive the message the record has been successfully completed.
    a. The Name, Age, ID and DOB have been populated in the upper left of the screen

Navigation Tips:

- Best practice – Identify Primary Phone Number and Email and Current Address, if applicable so that the information is available in the Person's Information Overview without any additional clicks.
- Once clicking Save and Continue, information is saved to that point and the profile created.
- Additional phone numbers may be entered by accessing: Person's Information Overview -> Phone # -> Click Details -> Click Add 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. 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. 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. Click Skip if the individual does not have an address

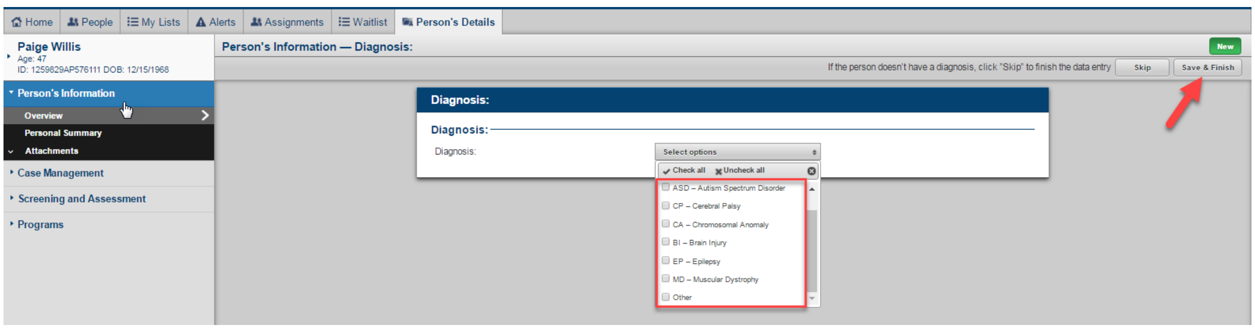
Tips:

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

Navigation Tip:
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. Select the diagnosis from the drop down. The Comment field disappears. If the drop down is not used, provide details in the Comment field. Click Save and Finish
    a. Click Skip if the individual does not have a diagnosis



10. Receive the Overview menu

11.3 Overview Menu

Purpose of This Function

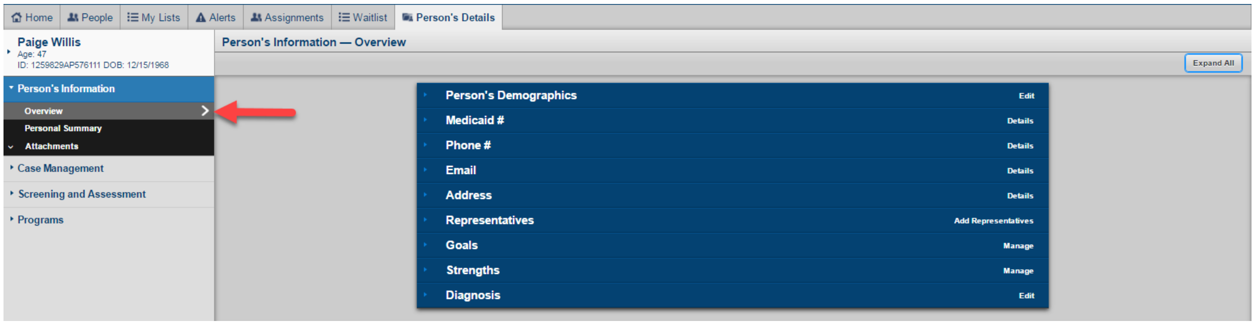
Provides detailed insight into the individuals profile and allows editing, managing or viewing based on access level

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 Return to Overview in the upper left corner if no edits are made
        i. Person's Demographics
        ii. Diagnosis
    b. Details – Click Return to Overview once review is completed
        i. Medicaid #
        ii. Phone #
        iii. Email
        iv. Address
    c. Manage – Click Return to Overview once completed
        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
- A person can have multiple phone numbers, email addresses and physical addresses within WaMS

11.4 Personal Summary

Purpose of This Function

View key information from actions completed through the WaMS system

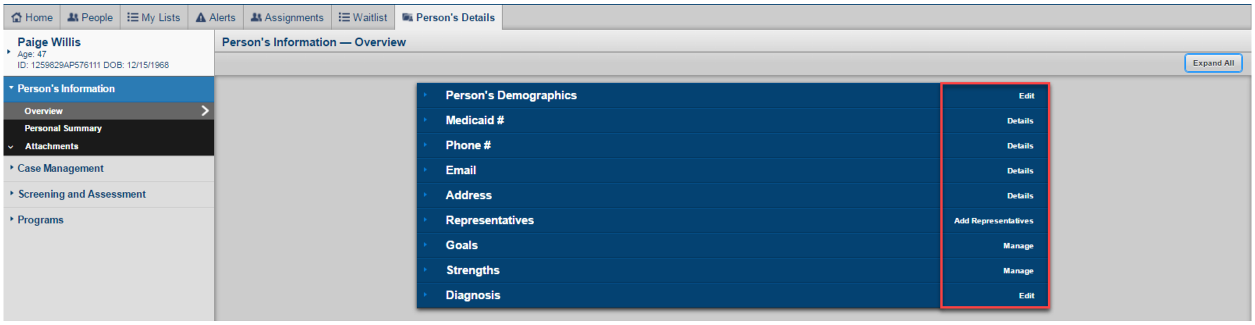
Who Can Use This Function

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 Person's Information Menu identifies the Personal summary information is available
    c. Waitlist includes a link to Add to Program Waitlist



2. View information

11.5 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

12 Case Management

12.1 CSB Assignments – Create, Transfer, Deactivate

Purpose of This Function

Assign a CSB to the individual

Who Can Use This Function

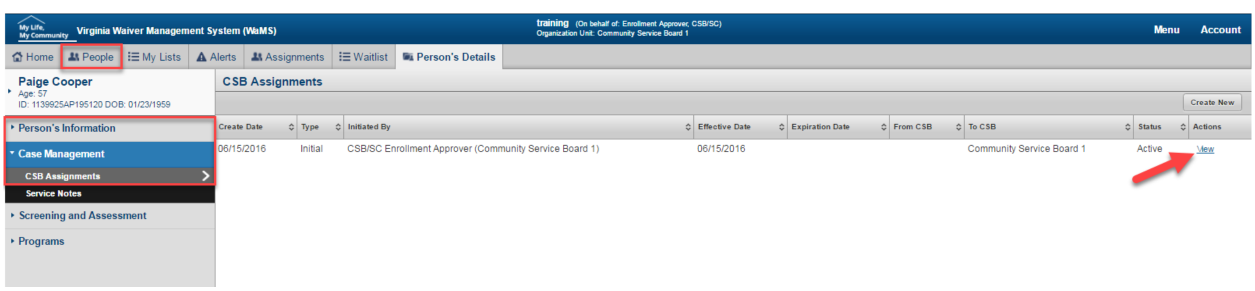
DBHDS, CSB

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)

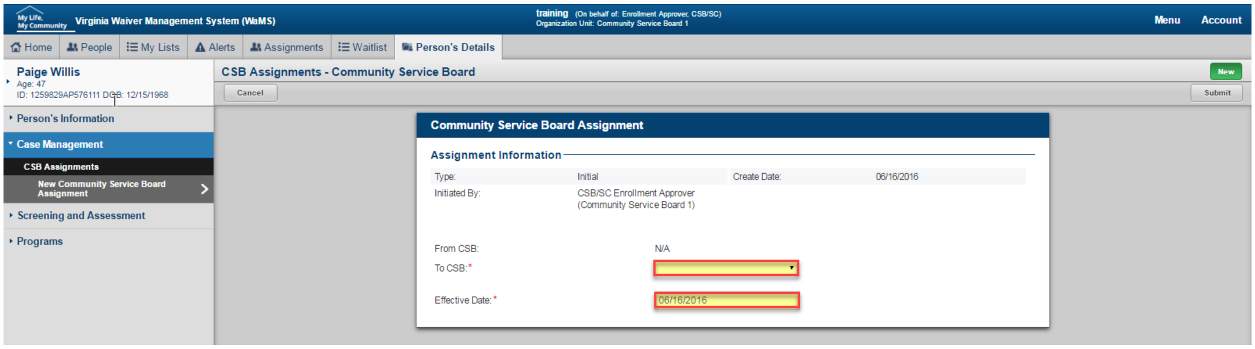
1. Access the CSB Assignments window (People tab -> Search -> click Summary -> Case Management -> CSB Assignments)



2. View an Existing CSB Assignment
   a. Click View to the far right of the name

12.1.1 Create a New Assignment:

1. New CSB Assignment needed: Indicated by “No data available in table”
    a. Click the Create New button to access the Community Service Board Assignment screen



    b. Select the “To CSB” using the drop down list
        i. CSB’s are only able to select their OU
    c. The Effective Date defaults to today’s date
2. Click Submit to receive confirmation of the Assignment

Tips:
- The From CSB is read only and populated with N/A when creating a new assignment
- The Effective Date cannot be edited when first assigning a CSB
- The only option on the “To CSB” drop down is the OU of the CSB creating the assignment

12.1.2 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

12.1.3 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

12.2 CSB Support Coordinator Assignment

Purpose of This Function

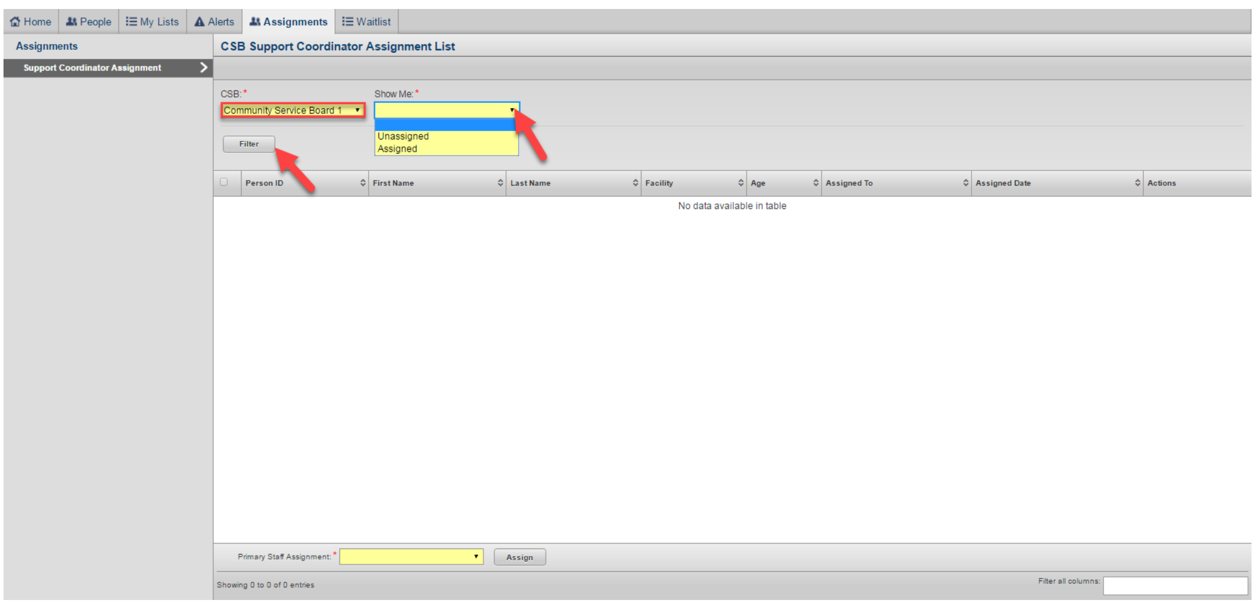
Assigning a Support Coordinator to particular person(s)

Who Can Use This Function

DBHDS, CSB

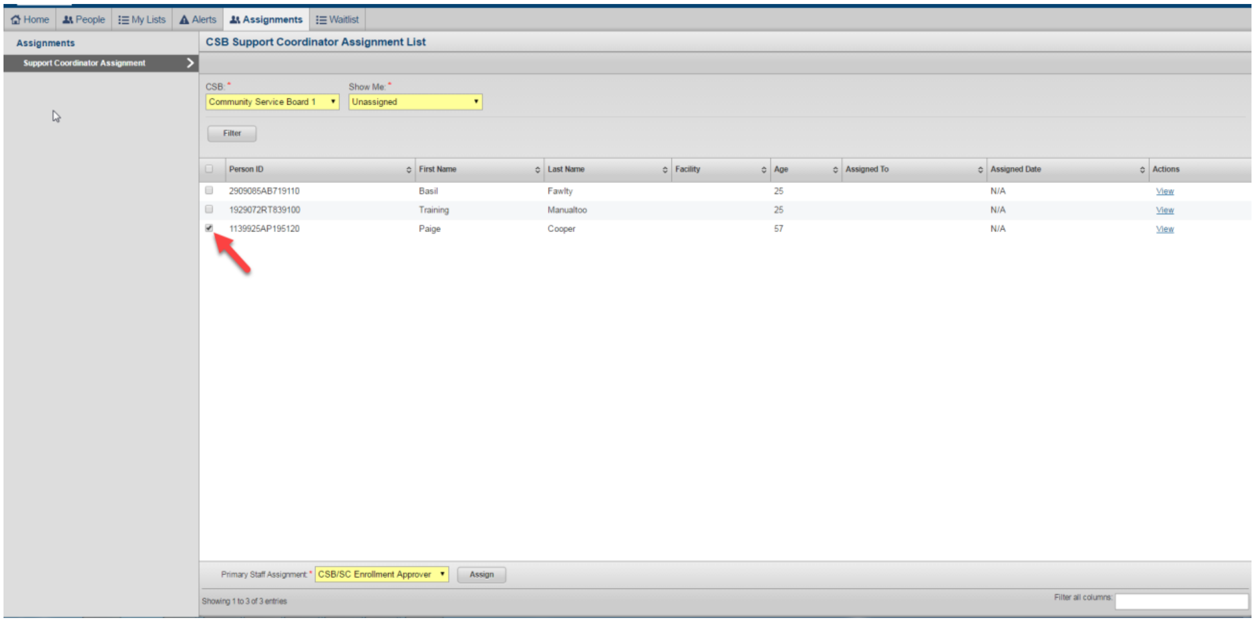
How to Use This Function

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”

12.3 Service Notes

Purpose of This Function

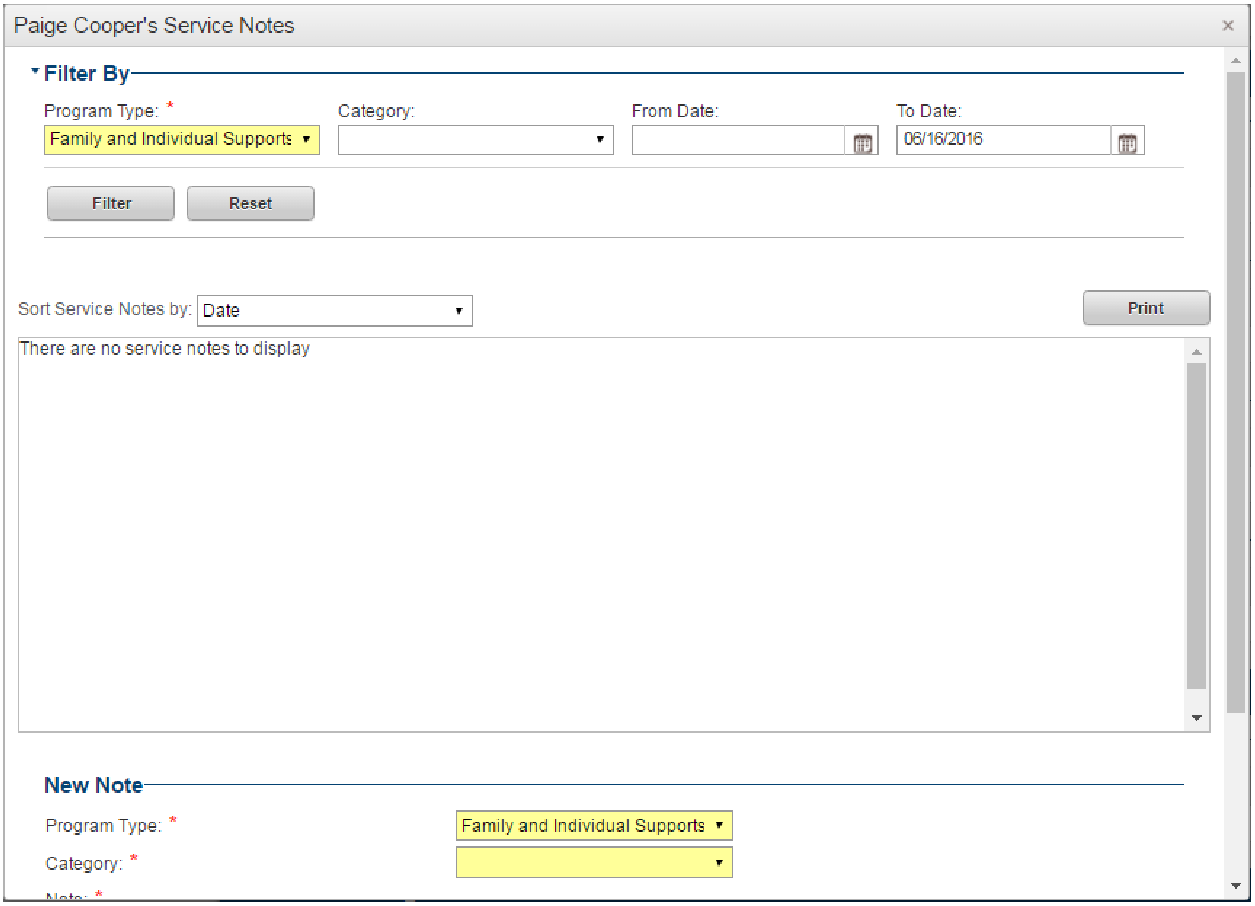
Add, view or print activity on the Person’s profile

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)



12.3.1 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

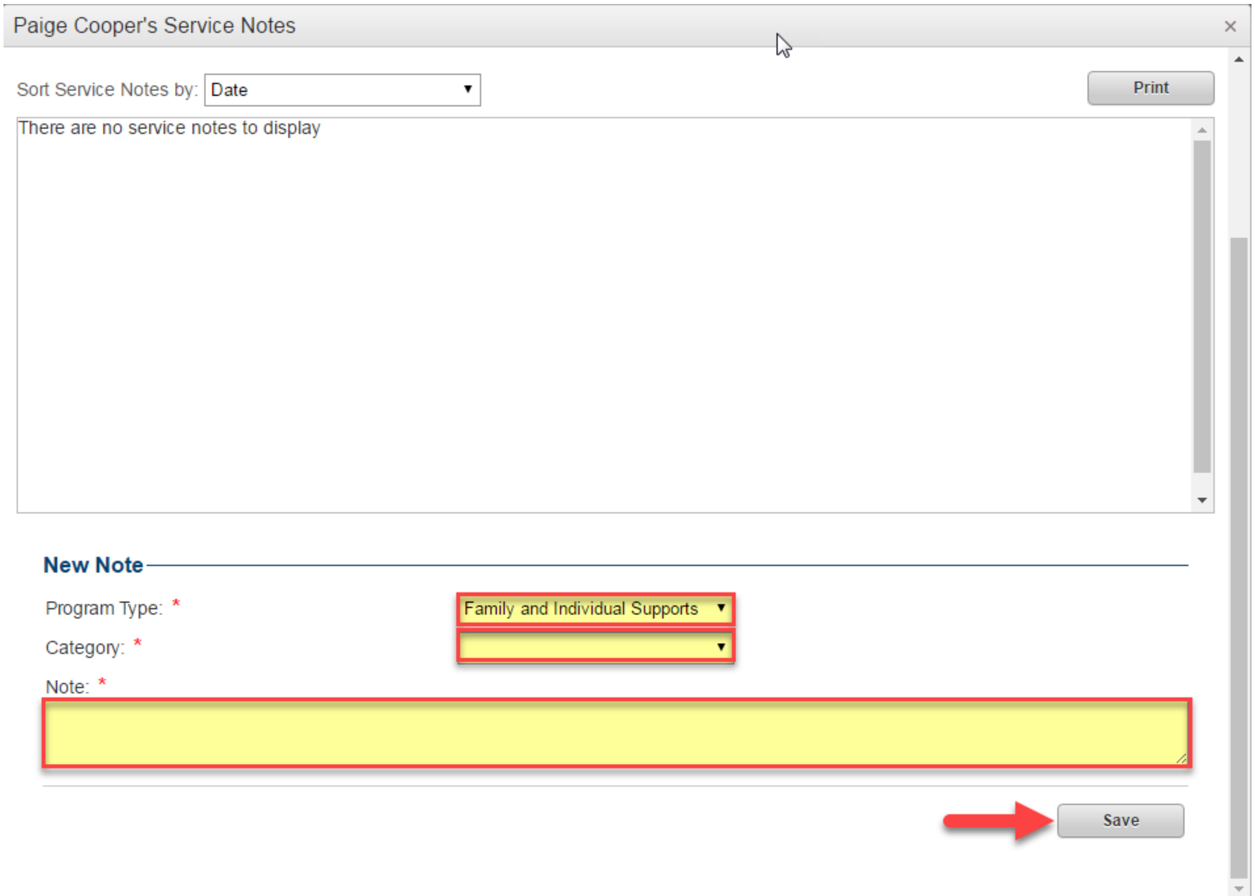
5. Service Notes may be sorted by:
    a. Date (default)
    b. Entered By
    c. Organization Unit

12.3.2 Print Service Notes

6. Click Print to print available Notes

12.3.3 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

13 Screening and Assessment

13.1 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.

13.1.1 Create VIDES

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

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.

13.1.2 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

13.1.3 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

13.1.4 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

13.2 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

Tip:
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

14 Programs

14.1 Enrollment Status

14.1.1 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.
- Active Status – Once an ISP starts WaMS creates an Active Status. NOTE: this is the only instance WaMS will systematically create an Active Status.
    - This may also be manually created

Who Can Use This Function

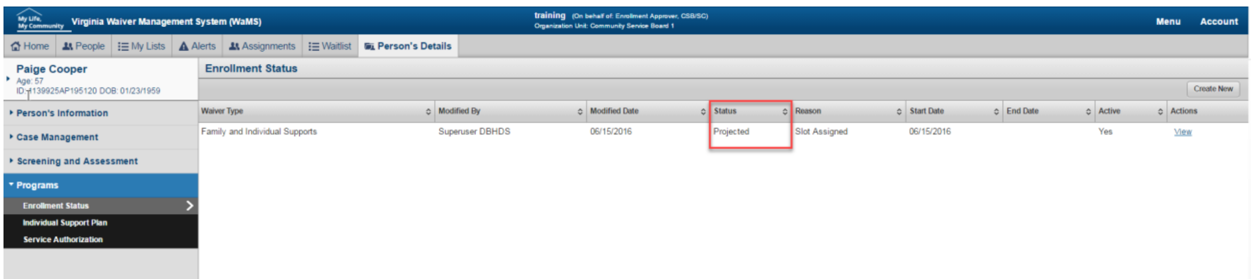
DBHDS, CSB

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



14.1.2 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 benefits and the reason for that status

Who Can Use This Function

DBHDS, CSB

How to Use This Function

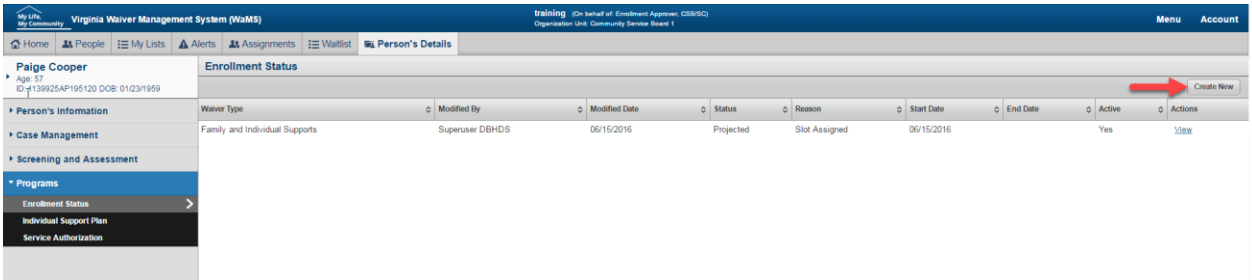
Note: Prior to this the following would have occurred:

- 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)

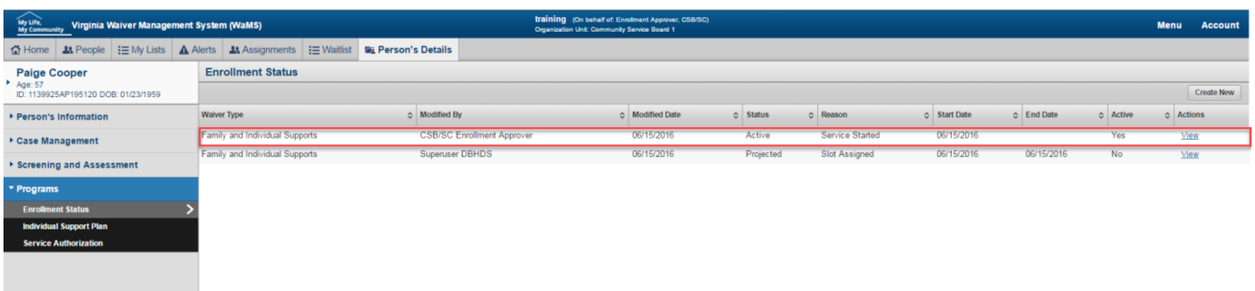
1. Access the Personal Summary Page (People tab -> Search -> click Summary)
2. Click Programs
3. Click Enrollment Status

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



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

14.2 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:

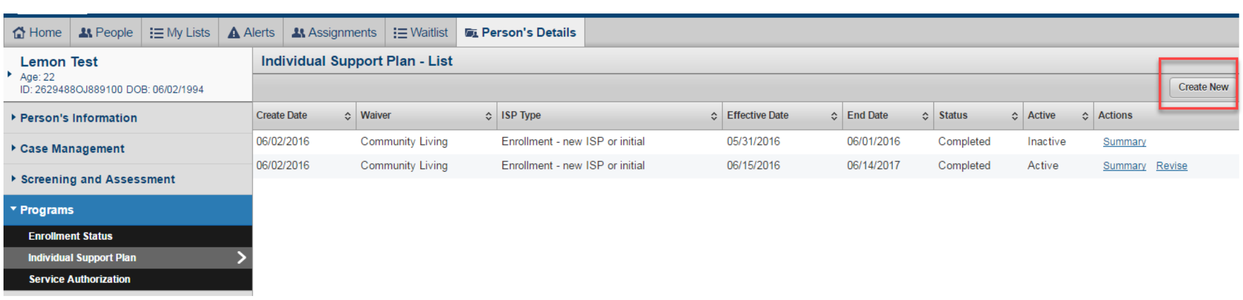
- Default start date of an individual service defaults to plan start date
- Default end date is displayed as Plan start date plus one year
- ISP service will only display services with selected program type based on Program Type data from the Service Definition
- The user will receive an error message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

14.2.1 Create an ISP

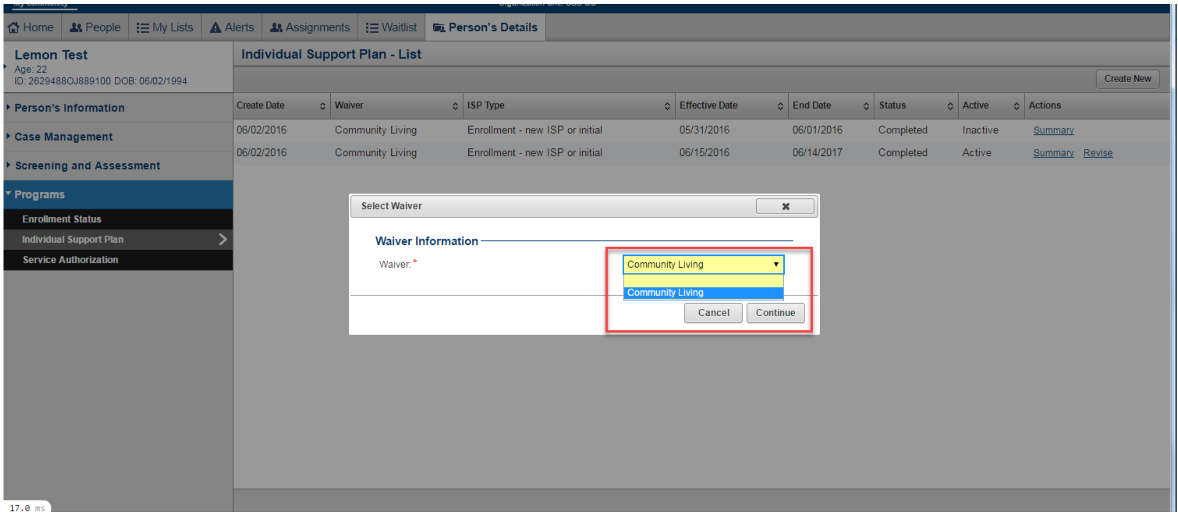
Tips:

- 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

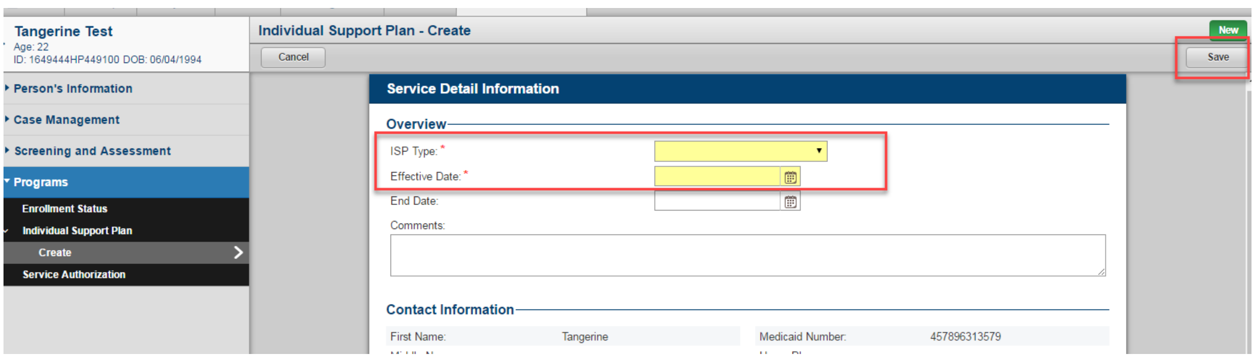
1. Access the Personal Summary (click People tab -> Search -> click Summary)
2. Under Programs, select Individual Support Plan-->Summary
3. Click Create New button



4. Confirm Waiver type from dropdown and click Continue button



5. Complete required fields



6. Click Save

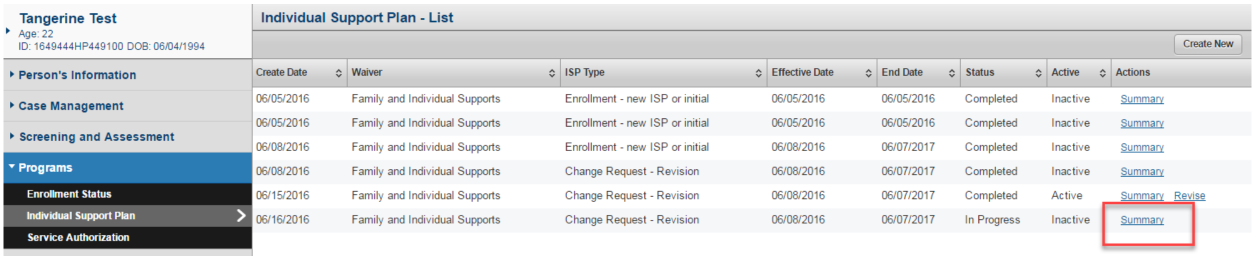
14.2.2 Edit in-progress ISP:

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 -> Summary

3. In Actions column, click Summary of ISP to be edited

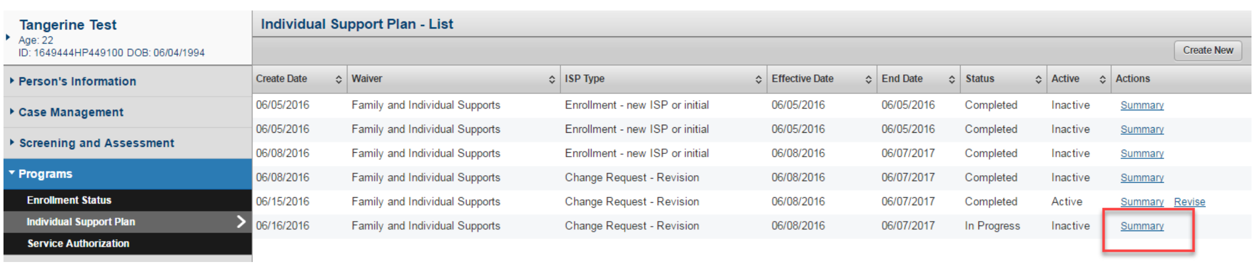


4. Click Edit Complete Edits to make the changes

5. Make the changes
6. Click Save

14.2.3 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



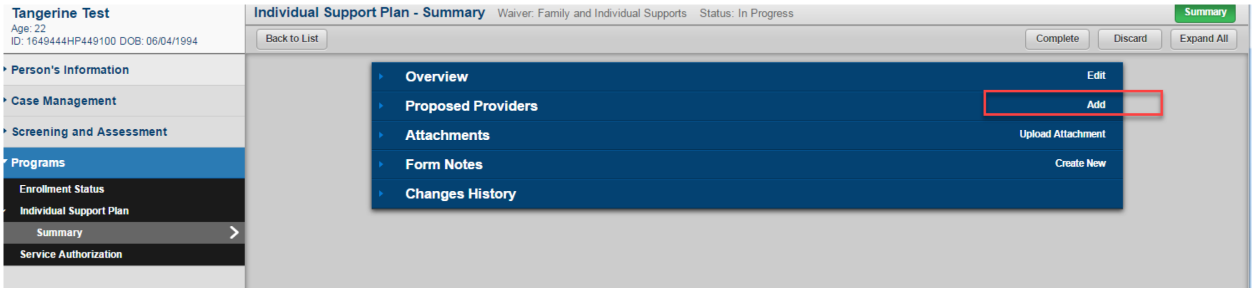
14.2.4 Add Provider to an In-Progress ISP

Provider Tips:

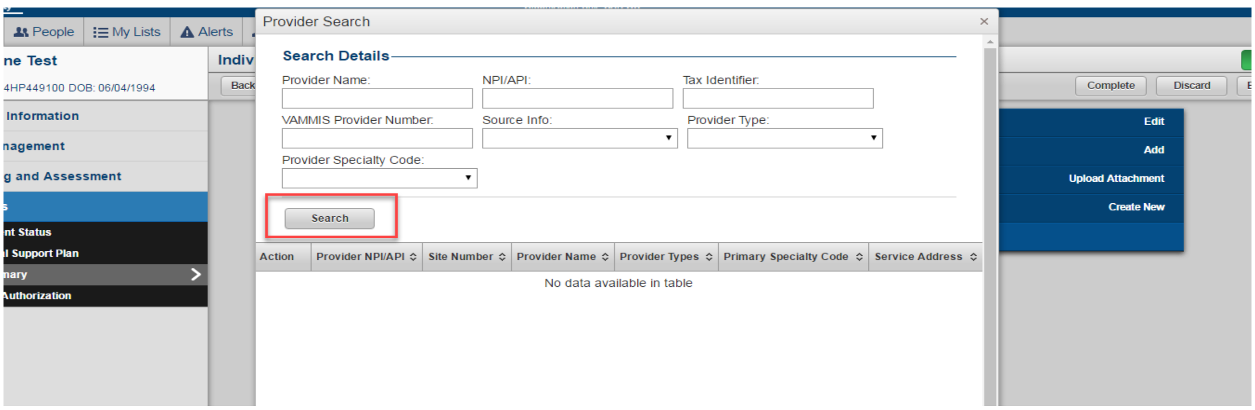
- If the Provider is not on the ISP, the Provider can only view general information about a person
- Providers automatically lose access to person's details once the ISP end date has passed
- Providers lose access to person's details if taken off the ISP

1. Navigate to Personal Summary (Click People tab -> Search -> click Summary)

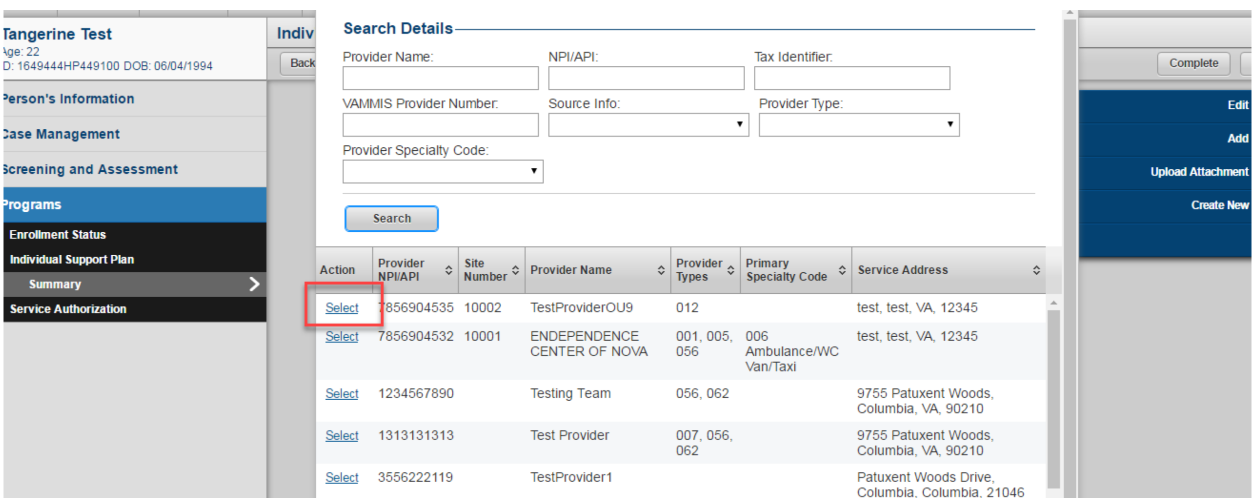
2. Under Programs, select Individual Support Plan -> Summary
3. In Actions column, click Summary of ISP providers are to be added to
4. Click Add in the Proposed Providers header



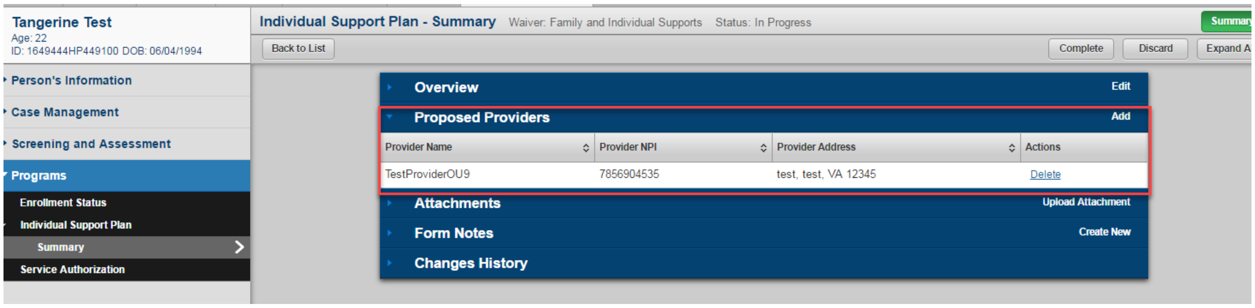
5. Click Search



6. Click Select button for Providers to be added

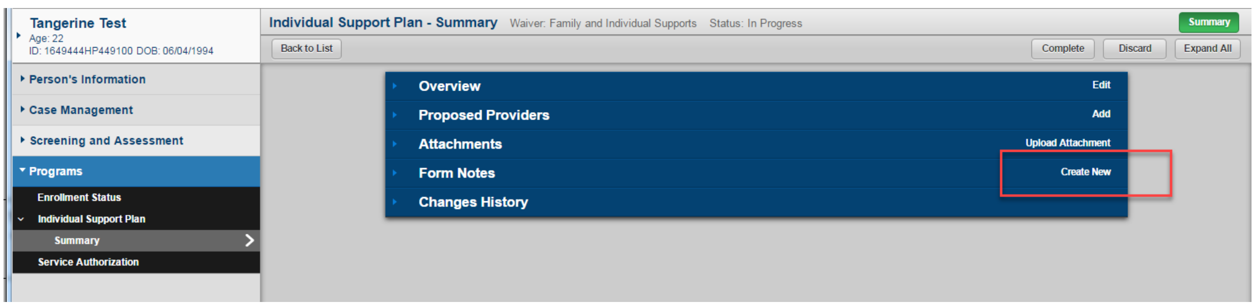


7. Click Proposed Providers header

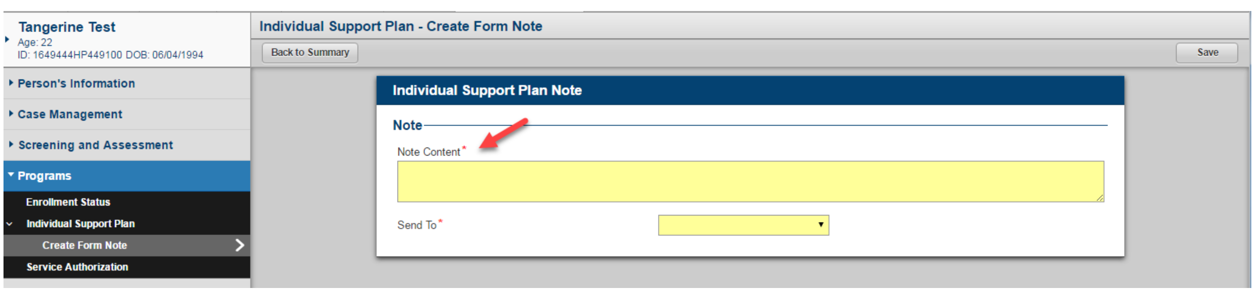


14.2.5 Add Notes to an In-Progress ISP

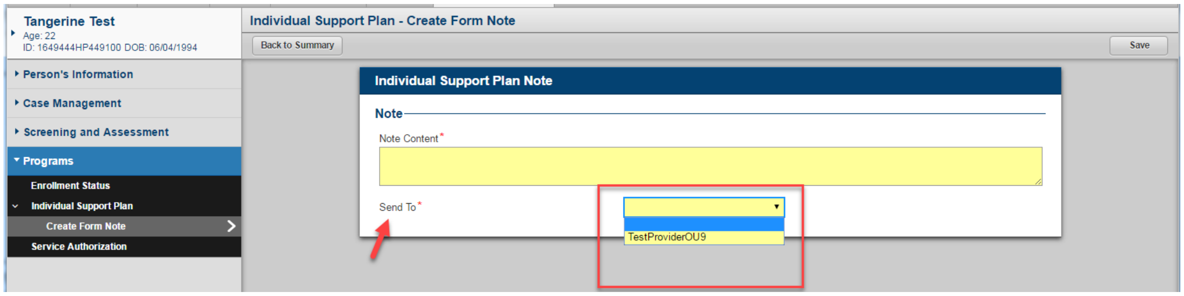
1. Navigate to Personal Summary (Click People tab -> Search -> click Summary)
2. Under Programs, select Individual Support Plan -> Summary
3. Under Actions, click Summary
4. Click Create New in the Form Notes header



5. Enter a note in the Note Content box



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

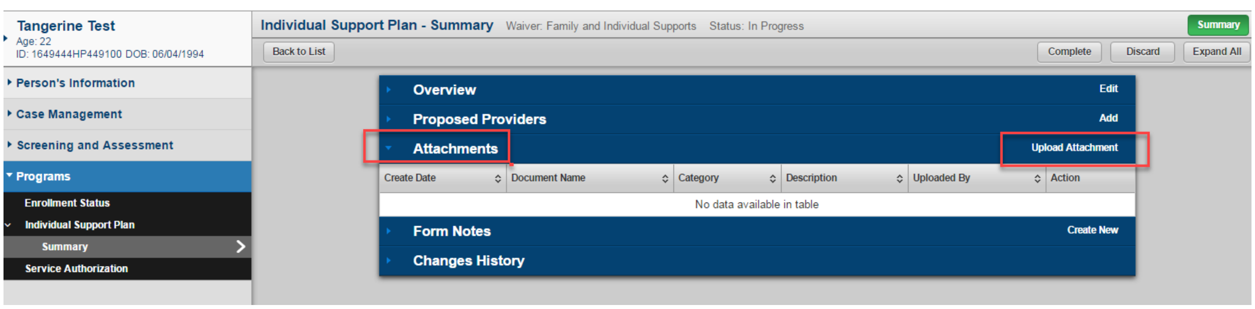


14.2.6 Add an Attachment to an in-progress ISP:

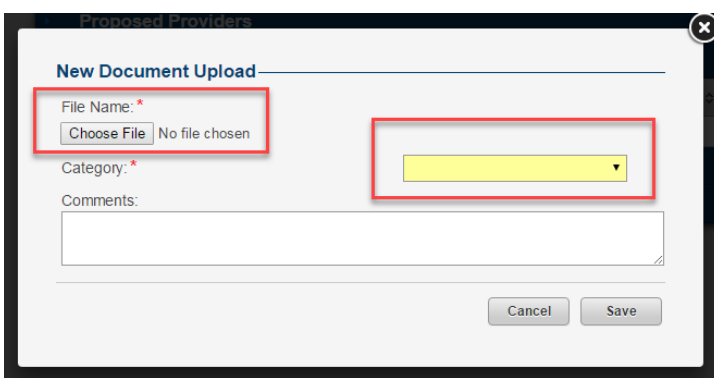
Tips:

- CSBs and Providers cannot delete attachments created by anyone else

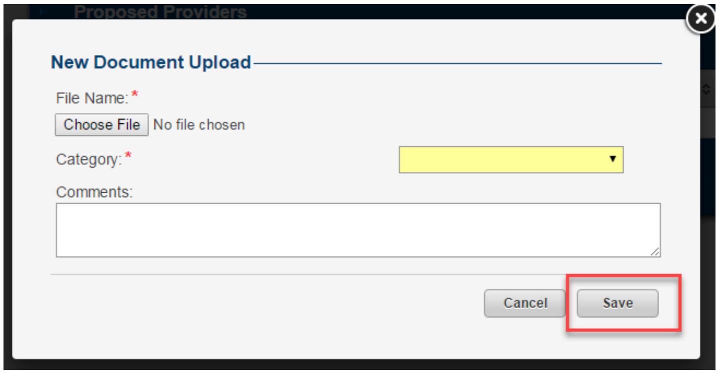
1. Navigate to Personal Summary (Click People tab -> Search -> click Summary)
2. Under Programs, select Individual Support Plan -> Summary
3. Under Actions, click Summary
4. Click Attachments header
5. Click Upload Attachment



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



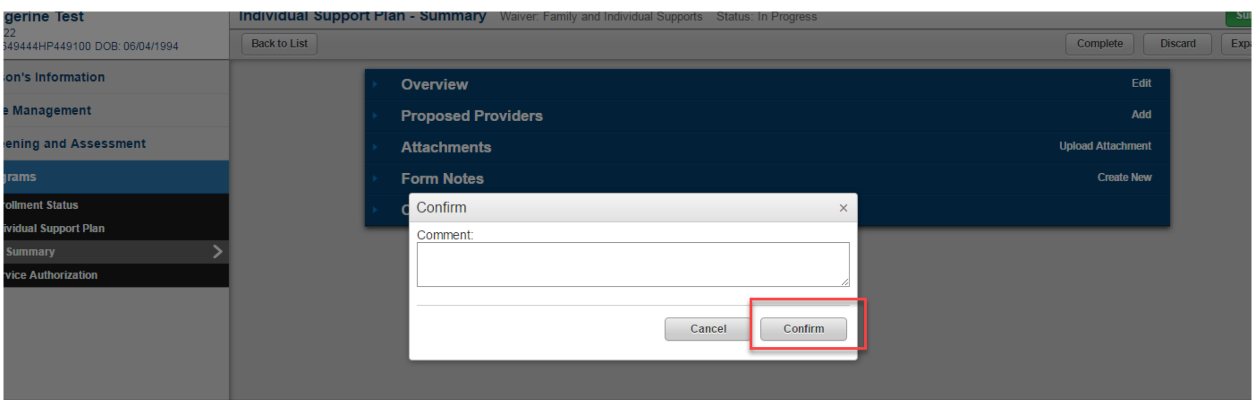
7. Click Save



14.2.7 Discard an In-Progress ISP

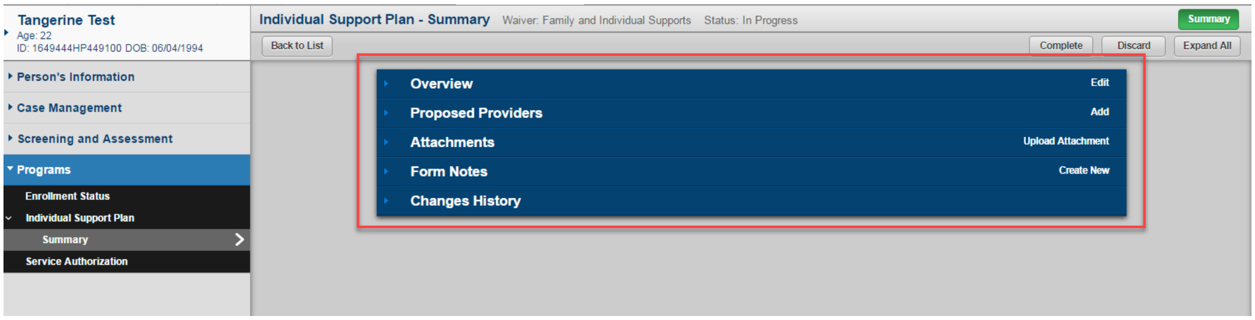
1. Navigate to Personal Summary (Click People tab -> Search -> click Summary)
2. Under Programs, select Individual Support Plan -> Summary
3. Under Actions, click Summary
4. Click Discard button

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



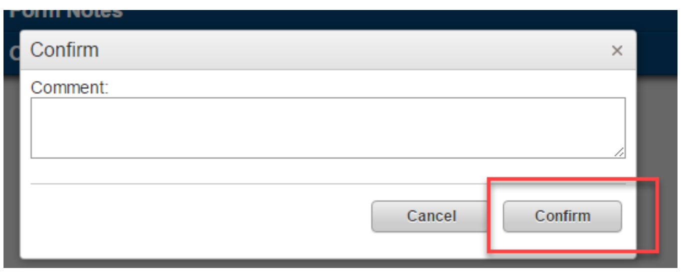
14.2.8 Complete an ISP

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



5. Click Complete button

6. Click Confirm

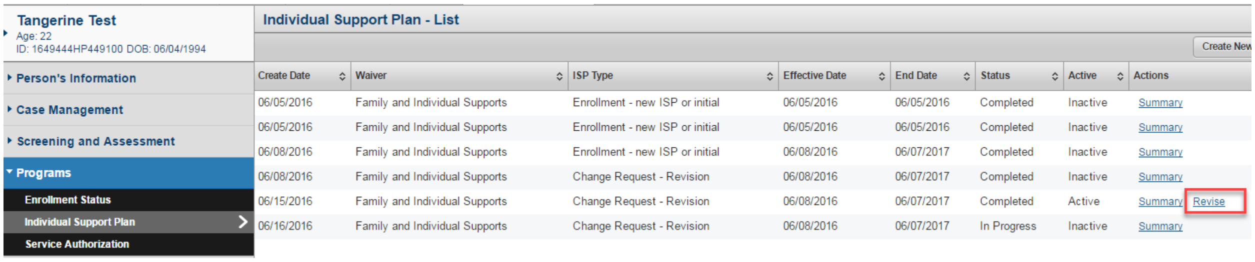


Tip:
An old ISP is marked "inactive" on the day the revised ISP goes into effect
When a slot is released, all ISPs under the person become inactive and ISP end date becomes date of slot released

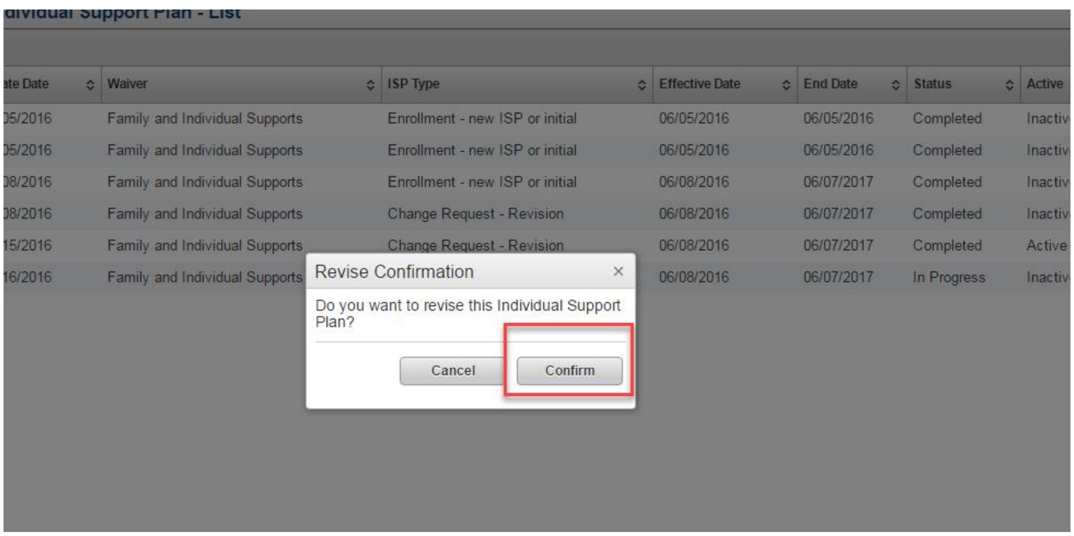
14.2.9 Revise an ISP

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



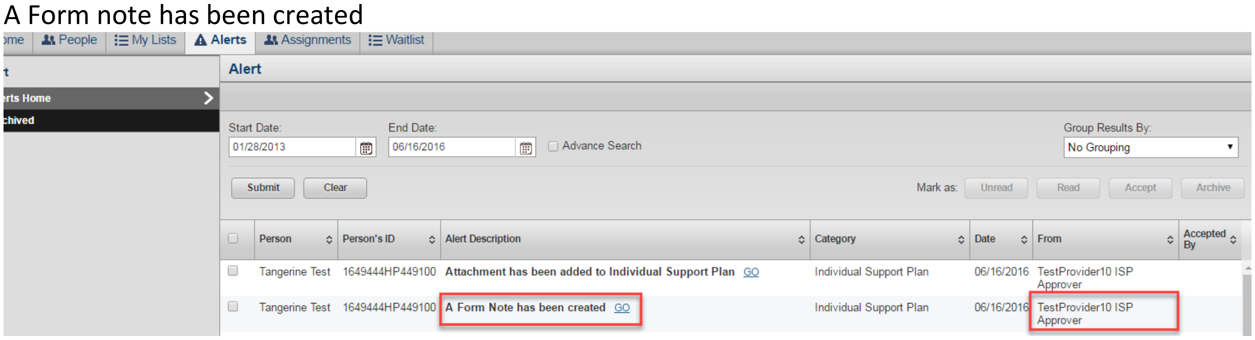
4. Click Confirm button and make necessary revisions



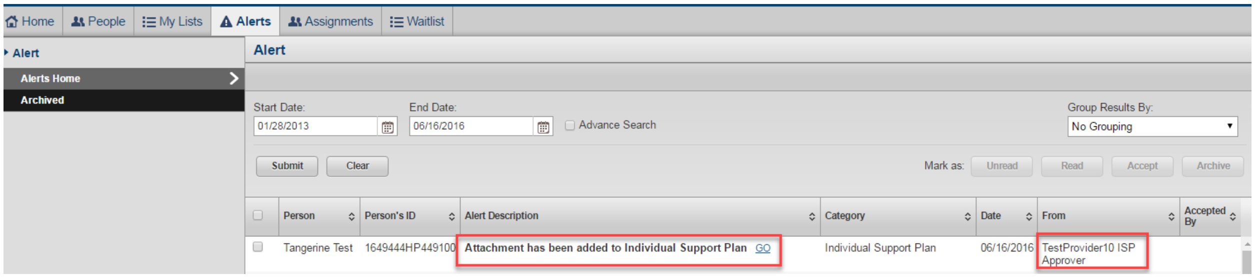
Tip:
- An old ISP is marked “inactive” on the day the revised ISP goes into effect
- Different ISP Type choices are available when revising the ISP

14.2.10 Alerts that CSB/SC Receives

1. A Form note has been created



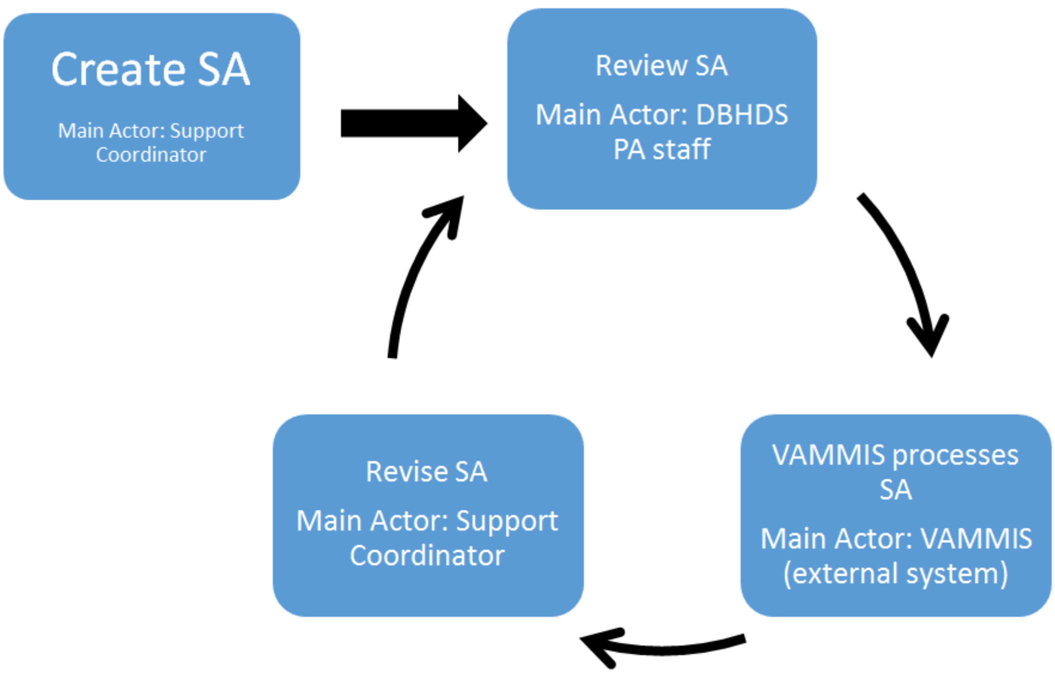
2. Attachment has been added to Individual Support Plan



3. Attachment has been removed from Individual Support Plan

14.3 Service Authorization

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



Tip:

- Support Coordinators and DBHDS PA staff can enter notes at any time in the Service Authorization process by clicking Note. Providers can view any Note, but cannot add any notes through this feature

14.3.1 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 (See: Slots)

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

Tips:

- A slot must be assigned to the person before a Service Authorization (SA) can be completed
- WaMS will default to the waiver type of the assigned slot
- CSBs are able to enter information at this stage
- DBHDS and Providers may only view at this stage

14.3.2 Add Service Line Item(s)

Purpose of This Function

Add service details based on the Waiver type

Who Can Use This Function

DBHDS, CSB

How to Use This Function

1. Access the Service Authorization Details Overview page and next to Service Details click Add
2. Complete required fields in Service Detail Information section
   a. Service – select from drop-down
   b. 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 – WaMS determines the Units and MMIS Units based on the Service selected . MMIS Units will populate based on the Units and the fudge factor of the service.
3. Click Save to view details of the new addition
4. Additional actions that may be completed:
   a. Add – add another Service
   b. By Service
      i. View
      ii. Edit
      iii. Delete

14.3.3 Submit the Service Authorization for Review

5. Click Submit for Review once all needed actions have been completed
   a. Add Comments to the pop-up requesting confirmation of the submission

Tips:
- 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

6. Service Authorization – Summary title bar reflects Status: Under Review

14.3.4 Revise a Service Authorization with an Service Authorization

Purpose of This Function

Revise a Service Authorization after it has been processed by VAMMIS

Who Can Use This Function

CSB

How to Use This Function

Note: Prior to this the following has occurred:
- PA staff has submitted the SA for processing through VAMMIS

- VAMMIS has returned the SA with an SA#
  1. Access the individual's SA Authorization – List Page (Personal Details -> Programs -> Service Authorization ->Service Authorization - List)

Tips:
- Items with a Processed status will have a Service Authorization Number and can only be viewed
- All service details must have a status prior to submitting the SA for review
- Services that have passed the authorized End Date may not be revised or ended unless they have a post authorization flag
- CSBs ending services: Services may only be ended between the Authorized Start Date and Authorized End Date unless the service has a post authorization flag

2. Click View on the item to be viewed to receive the Overview pop-up
3. Click Revise button in the upper right of the screen- the SA goes back to In Progress and the user can make edits from there
4. Make the necessary edits/revisions completing all fields
   a. If VAMMIS processed the Service Line Item, then the options available will be to View, Revise, and End (if applicable); revising one of these will create a new service line item. If VAMMIS was not able to process the Service Line Item(i.e. service was put on hold or VAMMIS was not able to process the Service Line item), then the options available will be View, Edit, and Delete; acting on these will not create a new service line item
   b. If selecting to end a service, the only available editable field for the Support Coordinator and PA staff will be the End Date

Tips:
- Services that have passed the authorized End Date cannot be revised or ended unless they have a post authorization flag
- If a CSB ends a service, then the end date cannot be before the authorized start date, after the authorized end date, or in the past (unless the service has a post-authorization flag)

5. Click Submit for Review
6. Begin workflow for SA again (See: Review SA and Submit for Processing. Complete this and all subsequent processes.)

14.3.5 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)

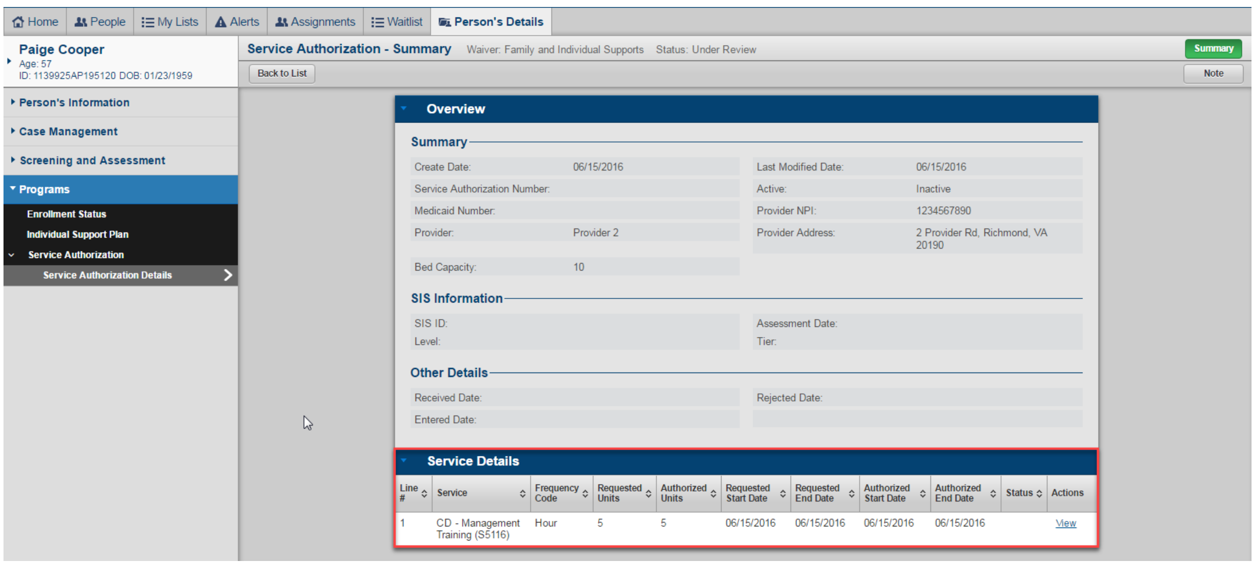
Navigation Tip:

- 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



15 My Lists

15.1 Enrollment

Purpose of This Function

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

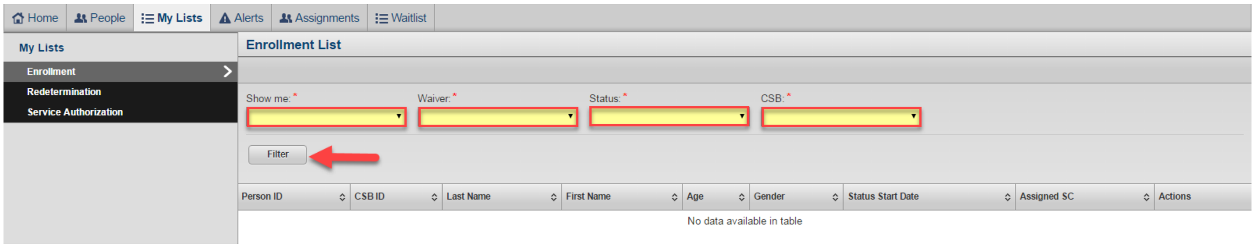
Who Can Use This Function

DBHDS, CSB

Providers (view only)

How to Use This Function

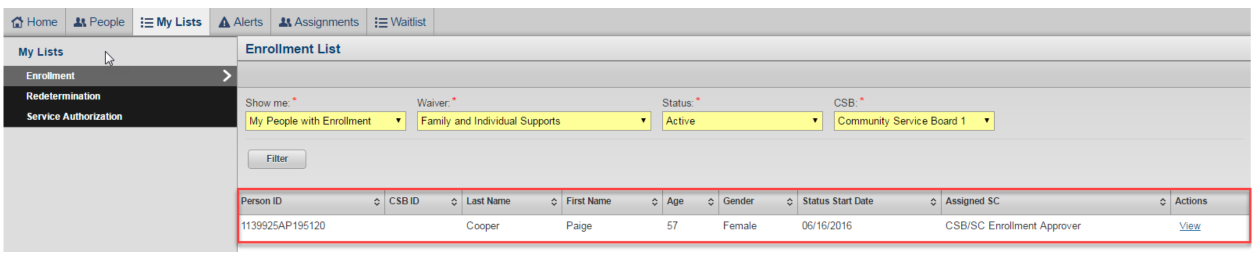
1. Access the Enrollment List Page (My Lists tab -> Enrollment)



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

15.2 Redetermination

Purpose of This Function

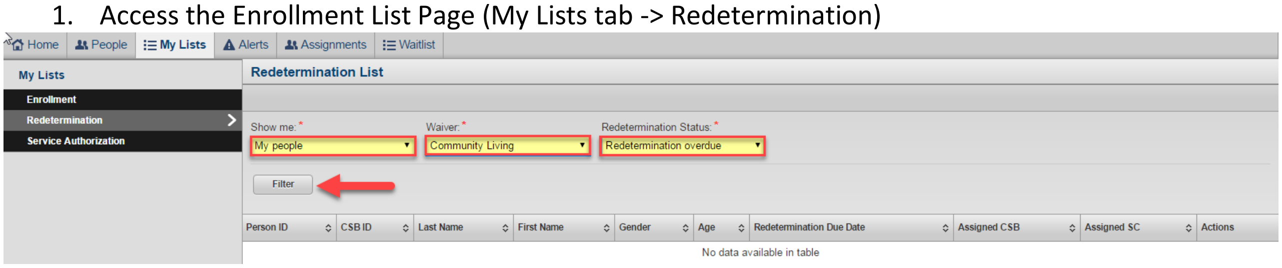
Easily view individuals in Redetermination

Who Can Use This Function

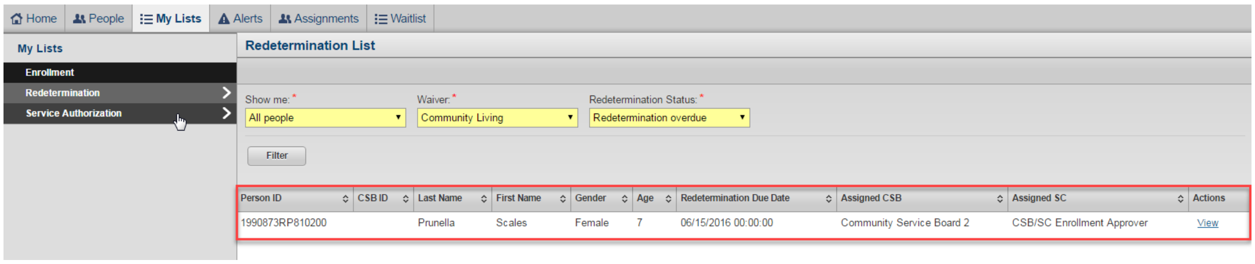
DBHDS, CSB

How to Use This Function

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



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

15.3 Service Authorization

Purpose of This Function

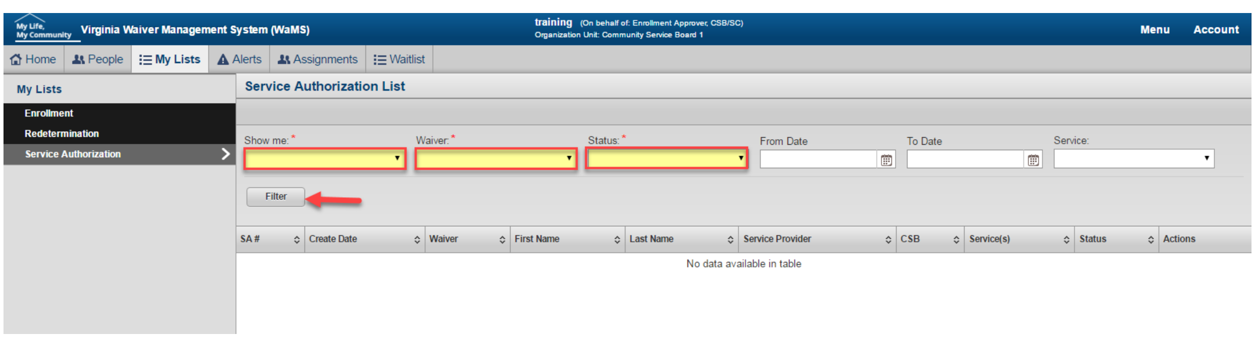
Easily view individuals Service Authorization

Who Can Use This Function

DBHDS, CSB

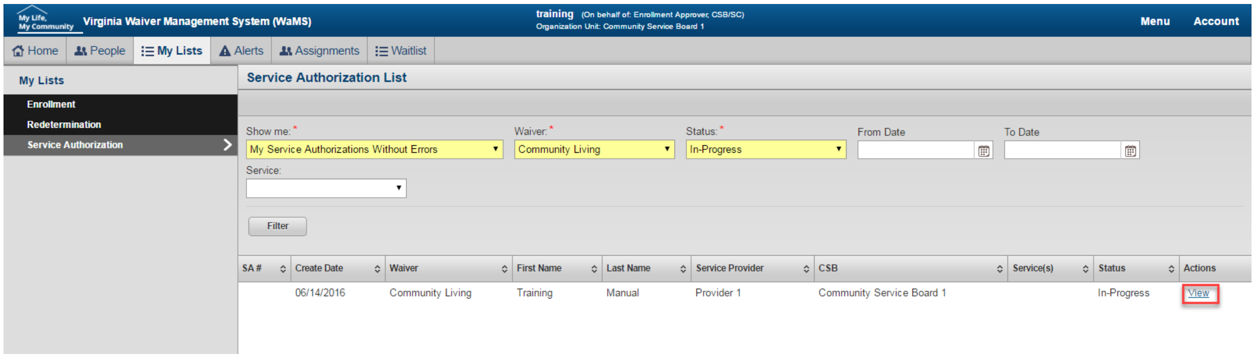
How to Use This Function

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



16 Waitlist

16.1 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

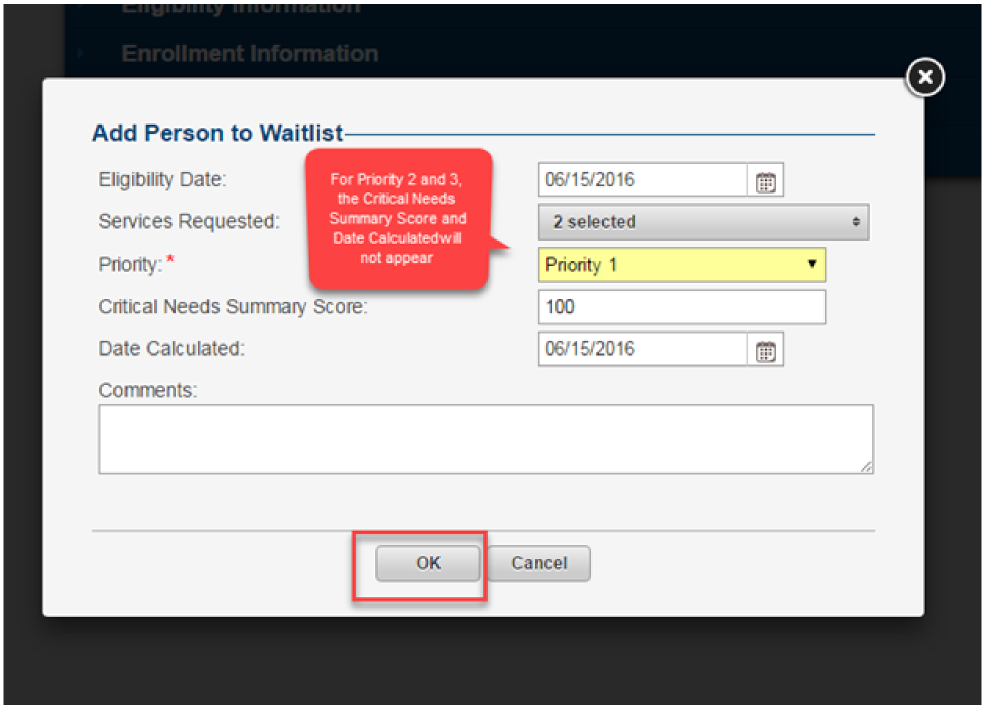
Note: A Person may be added to the Waitlist one of two ways:

- 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



16.2 Waitlist View

Purpose of This Function

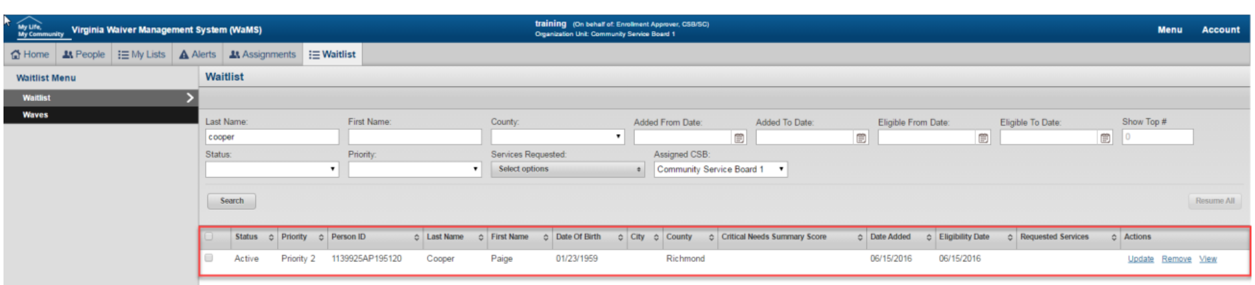
View Person's on the Waitlist

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

16.3 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

16.4 Wave View

Purpose of This Function

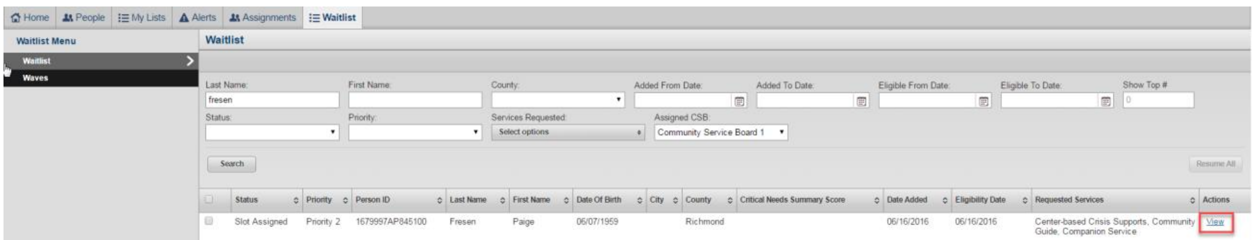
View Wave

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