

Regional Support Team
Virginia Informed Choice & Referral Forms

Waiver Management System (WaMS)

**User Guide for Community Services Boards
Support Coordinators**



Virginia Department of
Behavioral Health &
Developmental Services

DBHDS Vision: A life of possibilities for all Virginians

Copyright 2022 by Virginia Department of Behavioral Health & Developmental Services (DBHDS), Division of Developmental Services. All rights reserved. No part of this User's Guide may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without express written permission from DBHDS, 1220 Bank Street, Richmond, VA, 23219.

WaMS Data & Administration –Dated November 18, 2022

TABLE OF CONTENTS

1. Regional Support Team Referral Process.....	1
1.1. Regional Support Team Referral.....	1
1.2. When to Submit Referral	1
<i>Performance Contract.....</i>	<i>1</i>
2. Virginia Informed Choice Form (VIC)	2
2.1. About the VIC Form	2
2.2. Create New VIC.....	2
2.3. Submit VIC.....	5
3. RST Referral Workflow	6
3.1. Referral Workflow	6
3.2. Workflow History.....	7
4. Create RST Referral	8
4.1. Create New RST Referral	8
4.2. Overview Section	9
5. RST Referral – Section I.....	10
5.1. Edit Section I	10
6. Locate RST Referrals.....	13
6.1. Using Alerts.....	13
6.2. Using My Lists	13
7. RST Referral – Section II.....	15
7.1. Edit Section II	15
8. Recommendations Tracker	17
8.1. Add Actions Taken to Recommendations Tracker	17
9. Close RST Referral	18
9.1. Add Final Services Selection	18
10. Upload Attachments	19
10.1. Upload Attachments.....	19

11. Add Form Notes 21

12. Delete RST Referral 22

13. Statuses and Alerts..... 23

 13.1. RST Status Line and Descriptions.....23

 13.1. RST Referral Alerts24

14. Print Referral..... 25

 14.1. Print RST Referral.....25

15. Acronyms and Abbreviations..... 26

16. Get Help / Resources..... 27

 16.1. WaMS Help Desk27

 16.2. Community Resource Consultants (CRCs)27

Index 28

1. REGIONAL SUPPORT TEAM REFERRAL PROCESS

1.1. Regional Support Team Referral

The **Regional Support Team Referral** (RST Referral) process is completed via the RST Referral module in the Waiver Management System (WaMS).

Note: The VIC is required to be completed in WaMS before the RST referral can be created.

To begin the RST Referral process, the Community Services Board (CSB) Support Coordinator (SC) completes the Virginia Informed Choice form (VIC) in WaMS. Once the VIC has been submitted, the entire RST Referral process can be completed in WaMS.

1.2. When to Submit Referral

Performance Contract

The SC shall notify the Community Resource Consultant (CRC) and the Regional Support Team (RST) via the RST Referral in WaMS in the circumstances below. This will enable the RST members to monitor, track, and trend community integration and challenges that require further system development:

- a. within five calendar days of an individual being presented with any of the following residential options:
 - i. intermediate care facility,
 - ii. nursing facility,
 - iii. training center, or
 - iv. group home with a licensed capacity of five beds or more;
- b. if the CSB is having difficulty finding services within 30 calendar days after the individual's enrollment in a Developmental Disability (DD) Waiver; or
- c. immediately when an individual is displaced from his or her residential placement for a second time.

2. VIRGINIA INFORMED CHOICE FORM (VIC)

2.1. About the VIC Form

The VIC is required for individuals who are newly enrolled or currently have a DD Waiver. The SC should review and complete the VIC with the individual and/or their substitute decision-maker (SDM) annually at the following times:

Note: The VIC must be completed and submitted in WaMS before the RST Referral can be created in WaMS.

- At Enrollment into a DD Waiver:
 - Building Independence (BI)
 - Family and Individual Supports (FIS)
 - Community Living (CL)
- When there is a request for a change in waiver provider(s)
- When new services are requested
- When the individual wants to move to a new location and/or is dissatisfied with the current provider
- When making an RST Referral for individuals with a DD Waiver

2.2. Create New VIC

1. Locate and open the person's profile for which the VIC should be added in WaMS (e.g., using *People tab*).
2. From the *Screening and Assessments* section on the left navigation bar, click on **Virginia Informed Choice Form**.
The Virginia Informed Choice Form – List view appears on the right.
3. Click on **Create New**.
The Virginia Informed Choice Form appears.

Eve Moneypenny
Age: 23
ID: 1329991VE739120 DOB: 03/22/1999

- ▶ Person's Information
- ▶ Case Management
- ▼ Screening and Assessment
 - VIDES
 - SIS
 - Priority Needs Checklist
 - Critical Needs Summary
 - Slot Assignment Review Form
 - Virginia Informed Choice Form**
- ▶ Programs

4. Click on **Edit** to complete the 3 sections *Virginia Informed Choice*, *Waiver Options and Agencies Considered* and *Signature*.
5. Click on **Save** to complete each of the 3 sections.

Virginia Informed Choice section

Virginia Informed Choice

Does the person have a substitute decision-maker? * ☒ Yes ☐ No

Select type: * Legal Guardian

Substitute Decision-maker's Name(s): * James Bond

Does the person have a Supported Decision-Making Agreement? * ☒ Yes ☐ No

Effective date of Agreement: * 02/14/2022

Select DD Waiver: * Community Living

Has the SC has provided the individual and family with the following contact information for The Center for Family Involvement? * ☒ Yes ☐ No

You may contact VCU's Center for Family Involvement at (877) 567-1122 or visit <https://centerforfamilyinvolvementblog.org/> to connect with individuals and families who have waiver services.

If yes, the individual/family would like assistance with this referral? * ☐ Yes ☒ No

Has the SC provided the individual and family with the following contact information for The Arc of Virginia? * ☒ Yes ☐ No

If you have questions about Peer Mentoring contact: The Arc of Virginia at 804-649-8481 thearcova.org

If yes, the individual/family would like assistance with this referral? * ☐ Yes ☒ No

Has the SC provided the individual and family with information for The DBHDS licensing website and the My Life My Community Websites? * ☒ Yes ☐ No

Provider options are available on the DBHDS Licensing and the My Life My Community website
<https://vadbhdsprod.glsuite.us/GLSuiteWeb/Clients/vadbhds/Public/ProviderSearch/ProviderSearchSearch.aspx>
<http://www.mylifemycommunityvirginia.org/taxonomy/mlmc-menu-zone/find-provider>

Which one of the following is the primary reason for referral? * Difficulty finding services in...

Select options discussed *

Note: The person's current / active DD Waiver should be selected from the drop-down list. If the person does not have a waiver select "No DD Waiver".

Waiver Options and Agencies Considered section

Waiver Options and Agencies Considered

Select option considered

☐ Residential DD Waiver Options

☐ Employment and Day DD Waiver Options

☒ Medical and Behavioral Support DD Waiver Options

Service provided: * Private Duty Nursing

Agency Name: * Sunny Day Provider

Agency Location City/County: * City of Richmond x

Select size: * Size N/A

Service and provider selected? * ☒ Yes ☐ No

Briefly describe reason selected/not selected: *

Provider is awesome and able to start services immediately

Add New Agency Considered

Note: To add additional agencies considered, click the **Add New Agency Considered** button.

Signatures section

1. Select **Signer Type**
(Person, SDM, SC/CM).
2. Select **Signature Type**
(Written/Signature on File, E-signature, Updated manually)
3. Add **Print Name** and **Date Signed**.
4. Click on **Add New** for each signature.

Signatures

I may contact my Support Coordinator/Case Manager (SC/CM) to seek assistance with resolving provider-related issues. I have the option of changing providers, including my SC/CM. I have the right to a fair hearing and appeal process. I may be responsible for some service cost (patient pay), based on my income. If I choose Consumer-Directed Services, I am responsible for employing my own personal assistants and know there are services in the B/FIS/CL Waivers that require a backup plan if there is a lapse in services. I will actively participate in the development of my Person Centered Individual Support Plan.

My SC/CM discussed the above information with me.

Signer Type * SC/CM

Signature Type * Written/Signature on file

Clear Signature Save Signature

Choose File No file chosen

Please upload image file only and click save

Print Name * Support Coordinator

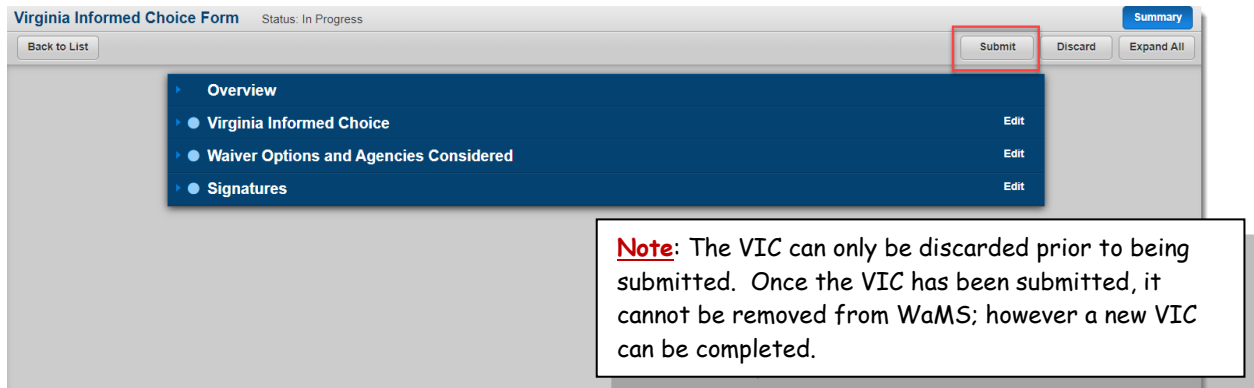
Date Signed * 09/26/2022

Add New

Note: The Person's and/or SDM signature and SC/CM signature must be added to complete the Signatures section.

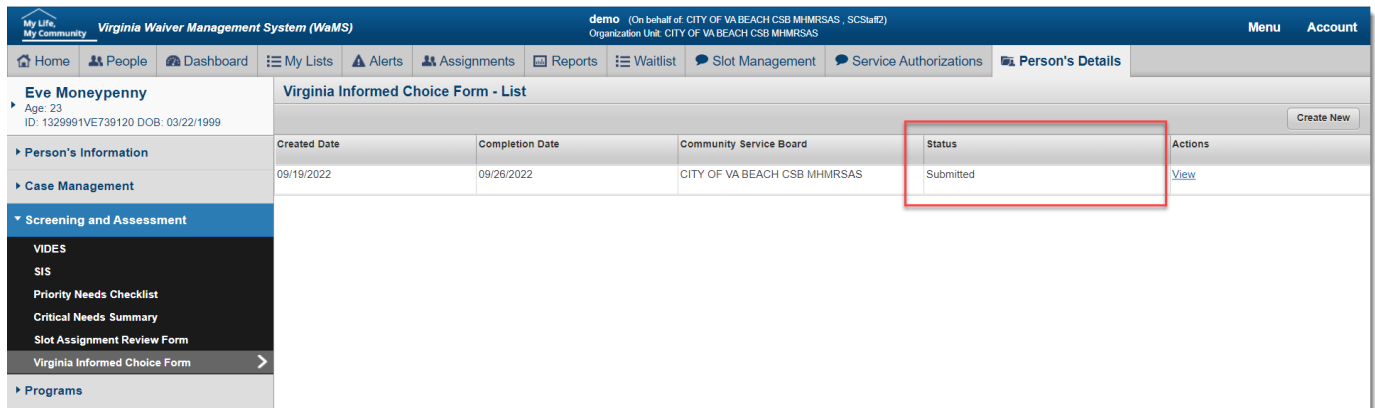
2.3. Submit VIC

Once all sections of the VIC have been completed (solid blue circles), the form can be submitted.



Note: The VIC can only be discarded prior to being submitted. Once the VIC has been submitted, it cannot be removed from WaMS; however a new VIC can be completed.

1. Click on **Submit**. The VIC Status changes from “In Progress” to “Submitted”.



Created Date	Completion Date	Community Service Board	Status	Actions
09/19/2022	09/26/2022	CITY OF VA BEACH CSB MH/MRSAS	Submitted	View

The RST Referral (located under the *Programs* menu) can now be completed in WaMS.

IMPORTANT: A new VIC must be created in WaMS each time an RST Referral is needed.

3. RST REFERRAL WORKFLOW

3.1. Referral Workflow

Use the RST Referral workflow section to view in WaMS is as follows (the sections SCs are responsible for are highlighted with blue background).

	WaMS RST Referral Workflow
1	CSB Support Coordinator (SC) <ul style="list-style-type: none"> After creating and submitting VIC Form, create RST Referral (<i>Section I</i>) Submit RST Referral to DBHDS for review
2	DBHDS Community Resource Consultant (CRC) <ul style="list-style-type: none"> Review VIC and RST Referral Edit Section II <ul style="list-style-type: none"> (a) Submit Emergency Meeting Request to <i>DBHDS RST Coordinator</i> (Section II) <ul style="list-style-type: none"> Go to 3(a) (b) Submit Recommendations to SC <ul style="list-style-type: none"> Go to 3(b)
3(a)	DBHDS RST Coordinator (If Emergency Meeting Recommended) <ul style="list-style-type: none"> Review VIC and RST Referral Edit Recommendations Tracker / Schedule Meeting <ul style="list-style-type: none"> Go to 5
3(b)	Support Coordinator (SC) <ul style="list-style-type: none"> Review Recommendations (<i>Section II</i>) Updates Referral (<i>Section II</i>) <ul style="list-style-type: none"> If YES – recommendations followed and YES resolved, provide Closing Summary and Close Referral If YES – recommendations followed and NO, not resolved, provide details and Submit referral to DBHDS RST Coordinator for review If NO – recommendations not followed, provide details and Close Referral
4	DBHDS RST Coordinator <ul style="list-style-type: none"> Edit Recommendations Tracker <ul style="list-style-type: none"> Assign Referral to Team / Schedule Meeting After Meeting provide Recommendations / Residential options <ul style="list-style-type: none"> If YES - more integrated residential options not operating in the desired location (<i>Residential Options Development are needed w/in 9 months</i>) Submit to SC for Closure

WaMS RST Referral Workflow	
After scheduled meeting	
5	Support Coordinator (SC) <ul style="list-style-type: none"> Review / edit Recommendation Tracker <ul style="list-style-type: none"> Answer Actions taken and outcome and Date completed Edit Final Services Selection <ul style="list-style-type: none"> Enter date all decisions confirmed Add additional comments if desired Answer Y/N questions Submit Referral to Close

3.2. Workflow History

Once an RST Referral is submitted to the CRCs for review, the *Workflow History* section (including workflow status, who performed the action and date the action was taken) can be reviewed throughout the process until closure.

1. Click on **Workflow History**. All status changes that have been made for the RST Referral process will display.

Workflow History				
Action Taken	Action Taken By	Date action taken	From Status	To Status
Submit	RST Coordinator	09/27/2022	Pending Referral Submission	Pending CRC Review
Submit	RST Coordinator	09/27/2022	Pending CRC Review	Pending Submitter Review
Submit	RST Coordinator	09/27/2022	Pending Submitter Review	RST Requested
Submit	RST Coordinator	09/27/2022	RST Requested	Pending Submitter Closure
Submit	DBHDS Super User	10/12/2022	Pending Submitter Closure	Closed

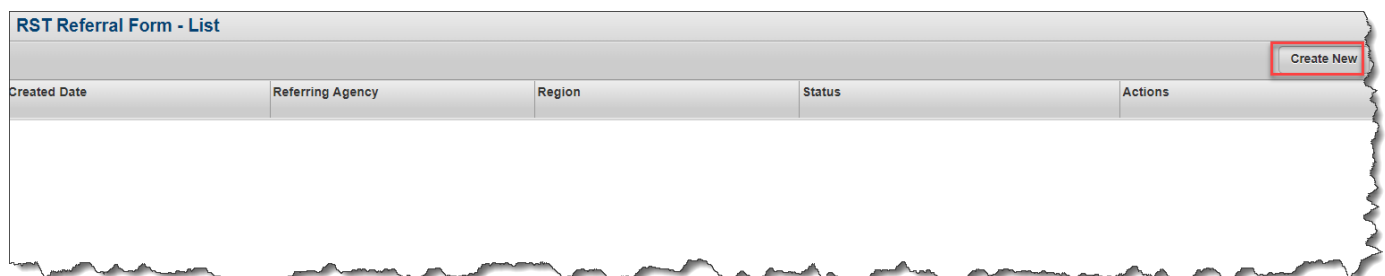
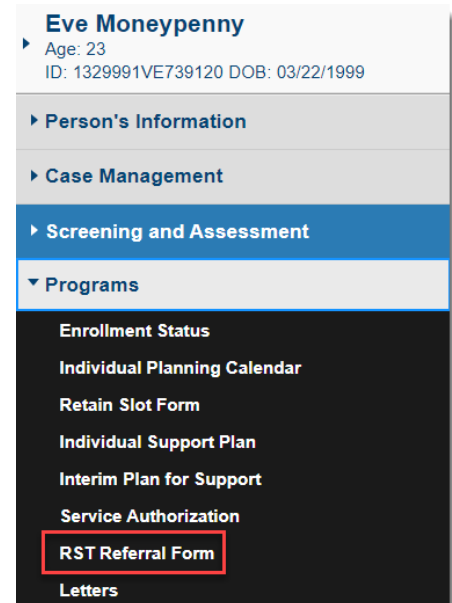
2. Click on **Workflow History** heading to expand and collapse this view.

4. CREATE RST REFERRAL

The RST Referral can be created after the VIC form has been created and submitted in WaMS.

4.1. Create New RST Referral

1. Locate and open the person's profile for which the RST Referral should be created in WaMS (*e.g., using People tab*).
2. From the *Programs* section on the left navigation bar, click on **RST Referral Form**.
The RST Referral Form – List appears (shown below).



3. Click on **Create New**. *The Virginia Informed Choice Form appears.*

RST Referral Form Status: Pending Referral Submission

Back to List Delete Expand All Summary

- Overview
- Section I Edit
- Section II
- Recommendations Tracker
- Final Services Selection
- Notes
- Attachments
- Workflow History

4.2. Overview Section

The *Overview* section of the RST Referral includes the date the RST Referral is created along with the First, Last, Preferred Name and Suffix for the person as well as their date of birth.

Overview	
Date Created	09/26/2022
First Name	Eve
Last Name	Moneypenny
Preferred Name	
Suffix	
Date of Birth	03/22/1999

1. Click on the **Overview** section header to expand and collapse this section.

5. RST REFERRAL – SECTION I

5.1. Edit Section I

1. Click on **Edit** to complete all required information (*denoted with red asterisk **) and add signature for Section I (see example in graphics below):

The following information is automatically inserted from other parts of the person's record including: The Living Situation, City/county of current residence, life the person wants / doesn't want (from the Individual Support Plan (ISP), Referring Agency (e.g., CSB name, staff and telephone number),

Section I

Current living situation: Living with Family

City/county of current residence*: Henrico

Describe Eve's vision of the life he or she wants*: Eve is a very loving and devoted daughter. Her family is very important to her. Eve spends the night at her Aunt's house once a month and video chats with her cousins. Eve lives in a quiet setting with plenty of room for her to move around. She lives in the country where she can see wildlife from a front or back porch, has a lot of bird feeders around and has a dog. Eve has her wants and needs met by familiar caring people who keep her involved with

Describe what Eve doesn't want in his/her life*: Eve's planning team believes she does not want the following in her life: hospitalizations, pain/discomfort, or excessive noise (unless it's music).

Enter referral agency information

Referring agency*: CITY

Referring agency region*:

Referring staff person*: CSB

Referring staff person phone*:

Referring staff person email*:

Referring staff person's supervisor*:

Referring staff person's supervisor phone*:

Referring staff person's supervisor email*:

Enter desired city/county*: Select...

Note: The information in these fields are auto populated from the person's most current ISP Part I. If necessary, these fields can be edited to reflect the person's "wants" and/or "doesn't want".

Associated Region where services are desired*

Which one of the following emergency referral criteria is primary?*

☐ No emergency criteria apply

☐ Currently homeless

☐ Has received an eviction/discharge notice will be homeless within next 30 days

☐ Damage to property or harm towards self/others within past 7 days

☒ Currently in crisis

☐ Has been identified for discharge from hospital, crisis program, or other inpatient treatment setting for admission to step down setting

☐ Environmental disaster (such as flood or fire)

☐ Current residential provider ceasing operations within next 30 days

☐ Move due to abuse, neglect, and/or exploitation

☐ Caregiver ceasing support within next 30 days

Which one of the following late referral criteria is primary?*

☐ No late criteria apply

☐ Individual has or will move prior to the RST meeting due to SC not submitting the referral within 5 calendar days of presenting a less integrated setting

☒ Individual has or will move without sufficient time to implement RST Recommendation(s)

☐ Individual moved without CSB notification

Is this a community/CSB referral? * ☒ Yes ☐ No

Select community/CSB referral reason:*

☒ Difficulty finding services in the community within 3 months of receiving a slot

☐ Moving to a group home of five or more individuals

☐ Moving to a nursing home or ICF

☐ Pattern of repeatedly being removed from the home

☐ Difficulty finding resources in the community within any timeframe

☐ At REACH without disposition

Is this referral related to a residential move? * ☐ Yes ☒ No

Is financial support limiting access to resource/s (Check all that apply) * ☒ Yes ☐ No

Medicaid ☒

Select one*

☐ Has not applied

☒ Application pending

☐ Application denied

DD Waiver slot ☐

Customized Rate ☐

Crisis Funds ☐

Housing Assistance ☐

Are there concerns with transportation? ☒ Yes ☐ No

Are more integrated services (4 or fewer in the setting) being considered? ☒ Yes ☐ No

Select Service *

Crisis Support DD Waiver Options

If selected choose service *

☐ Community-Based Crisis Supports

☒ Crisis Support Services

Are there barriers to this service? ☐ Yes ☒ No

Add New Service Considered

Is there difficulty locating a less integrated service? ☒ Yes ☐ No

Select less integrated services that apply: *

☐ ICF/IID

☐ Group Day

☐ Group Home 5+

☒ Nursing Facility

☐ Group Supported Employment

Provide information you think may be helpful in the RST review process and/or other barriers not identified above. *

Additional helpful information here

Signature * Written/Signature on file

Name * Support Coordinator Name

Date 09/27/2022

- Click on **Save** once all required (denoted with red asterisk *) have been completed and signature added.
The section closes and the main RST Referral Form appears with Status: Pending Referral Submission.

RST Referral Form Status: Pending Referral Submission

Back to List

Summary

Submit Delete Expand All

Overview

Section I

Section II

Recommendations Tracker

Final Services Selection

Notes

Attachments

Workflow History

- Click on **Submit**.
The RST Referral is submitted to the DBHDS CRC team for review.

6. LOCATE RST REFERRALS

Once an RST Referral has been reviewed, the CRC will either (a) submit the referral to the RST Coordinator to request an emergency meeting; or (b) submit the referral back to the SC with recommendations. The SC will receive an alert in WaMS once a referral is submitted with recommendations from the CRC. Referrals can be easily located in WaMS using Alerts or My Lists.

6.1. Using Alerts

When a referral has been submitted for review, the SC will see an alert in WaMS.

1. Click on the **Alerts** tab to view all alerts.
2. Click on **Go** to open the person's record you wish to review.

6.2. Using My Lists

My Lists can also be used to locate a person's referral based on specific criteria or category as defined in the drop-down list. The referral can be filtered per CSB by *Status*, *Region*, *Team*, *Date of Meeting*, *Type of Referral* and/or *Emergency Meeting Recommended*.

1. Click on **My Lists** tab.
2. Click on **RST Referral Form** on the left menu. *The My Lists window appears.*

- Click the **Show Me** drop down to select either “My RST Forms” or “All RST Forms”.
- Click the **Status** drop down to filter the based on the referral status. The following statuses are available to select:

Status:

- Pending Referral Submission
- Pending CRC Review
- Pending Submitter Review
- Referral Closed
- RST Requested
- Pending Submitter Closure
- Closed
- Closed Timeframe Exceeded
- Closed Action Needed

NO data available in table

- After all search criteria is selected, click on **Filter**. *The filtered list will appear.*

Created Date	Person ID	First Name	Last Name	CSB	Region	Team	Emergency	Status	Date of Meeting	Action
09/29/2022	2589590LC069100	Cliff	Hanger	CITY OF VA BEACH CSB MEMBERS	Region V	Team V	No	RSTRequested		View
10/03/2022	2329710OG838120	Gomez	Addams	CITY OF VA BEACH CSB MEMBERS	Region III		Yes	RSTRequested		View
10/12/2022	2110021UB960220	Buster	Brown	CITY OF VA BEACH CSB MEMBERS	Region III	Team III	Yes	RSTRequested		View

7. RST REFERRAL – SECTION II

The SC should view recommendations made by the CRC in the RST Referral and state if the recommendations have been followed. This is accomplished in *Section II* of the RST Referral form.

7.1. Edit Section II

1. Click on **Edit** for *Section II*. The *Section II* window appears.
2. Review the information located in the *Enter recommendations* section (see section highlighted in yellow in the graphic below).
3. Answer **Yes** or **No** to the question *Recommendations followed?*

The screenshot shows the 'Section II' form. It contains two questions with radio button options: 'Does the CRC recommend an emergency meeting?' (Yes/No) and 'Does the CRC have recommendations to resolve barriers or address concerns?' (Yes/No). Below these is a text box for 'Enter recommendations' with a yellow highlight containing the text 'Work with REACH to coordinate CTH admission'. At the bottom is a question 'Recommendations followed?' with Yes/No options. Red brackets and boxes highlight the 'Enter recommendations' field and the 'Recommendations followed?' question. Two callout boxes provide notes: one stating that CRC information cannot be edited by the SC and that the recommendation will be in the highlighted field, and another stating that the SC must complete the 'Recommendations followed' question.

Section II

Does the CRC recommend an emergency meeting? ☐ Yes ☒ No

Does the CRC have recommendations to resolve barriers or address concerns? ☒ Yes ☐ No

Enter recommendations *

Work with REACH to coordinate CTH admission

Recommendations followed? * ☐ Yes ☐ No

Note: The information entered by the CRC cannot be edited by the SC.

Recommendation made by the CRC will be in the *Enter recommendations* field (highlighted in yellow).

Note: SC must complete the *Recommendations followed* question.

- a. If answered **No**, a text box appears for the SC to provide additional information.
- b. If answered **Yes**, a new question “*Recommendations resolved barriers or concerns?*” appears.
 - i. If answer is **Yes**, provide a *Closing Summary* statement.
 - ii. If answer is **No**, a text box appears to provide additional information. (See example below).

Section II

Does the CRC recommend an emergency meeting? ☐ Yes ☒ No

Does the CRC have recommendations to resolve barriers or address concerns? ☒ Yes ☐ No

Enter recommendations *

Work with REACH to coordinate CTH admission

Recommendations followed? ☒ Yes ☐ No

Recommendations resolved barriers or concerns? ☐ Yes ☒ No

Please describe *

Working with REACH for admission. Waiting on medical to approve.

4. Click on **Save**. *The RST Referral Form main screen appears.*
5. Click on **Submit**. *The referral is submitted. The status of the referral updates to “RST Requested”.*

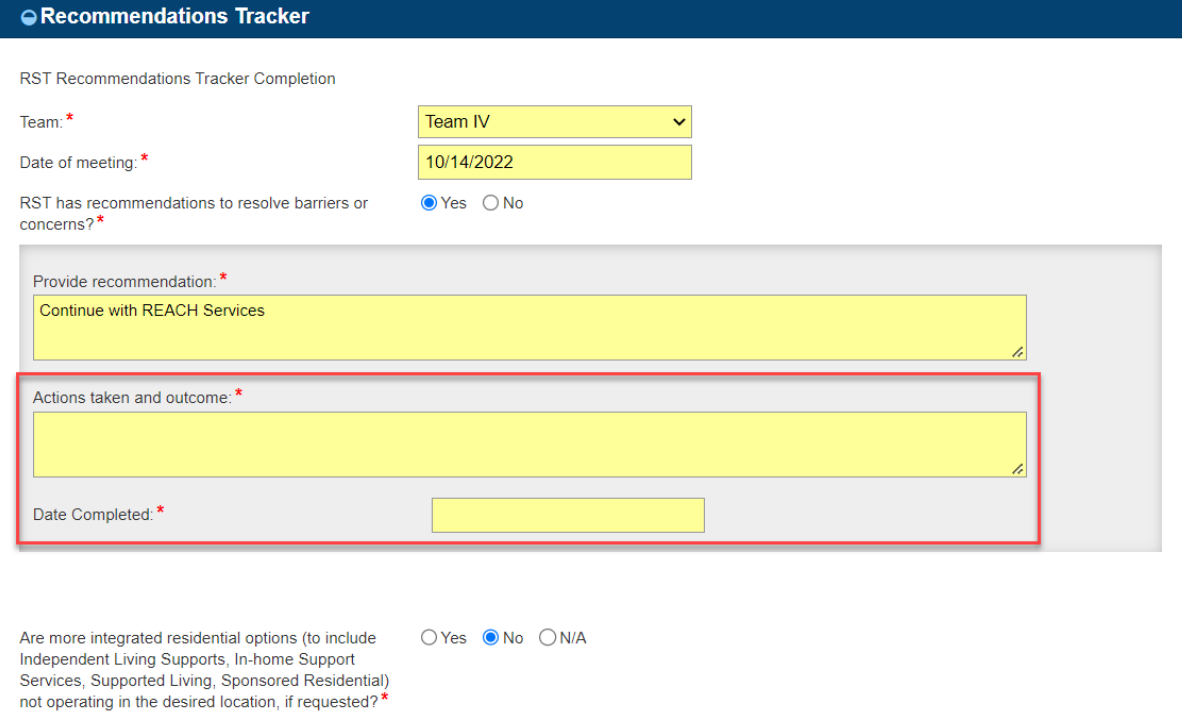
- Once the RST Referral is submitted, the RST Coordinator will review the request and schedule a meeting with the RST members.
- After the meeting has been held, the RST Coordinator will update and notify the SC with recommendations and other information.
- The SC will receive *Alerts* and can view the workflow process by clicking the *Workflow History* heading.

8. RECOMMENDATIONS TRACKER

The *Recommendations Tracker* is used track actions related to recommendations resulting from an RST review. The Recommendations Tracker should be completed with actions taken, outcome and date completed. If a recommendation is incomplete, an explanation should be provided.

8.1. Add Actions Taken to Recommendations Tracker

1. Click on **Edit** for *Recommendations Tracker* section. *The Recommendations Tracker window appears.*



Recommendations Tracker

RST Recommendations Tracker Completion

Team: * Team IV

Date of meeting: * 10/14/2022

RST has recommendations to resolve barriers or concerns? * ☒ Yes ☐ No

Provide recommendation: * Continue with REACH Services

Actions taken and outcome: *

Date Completed: *

Are more integrated residential options (to include Independent Living Supports, In-home Support Services, Supported Living, Sponsored Residential) not operating in the desired location, if requested? * ☐ Yes ☒ No ☐ N/A

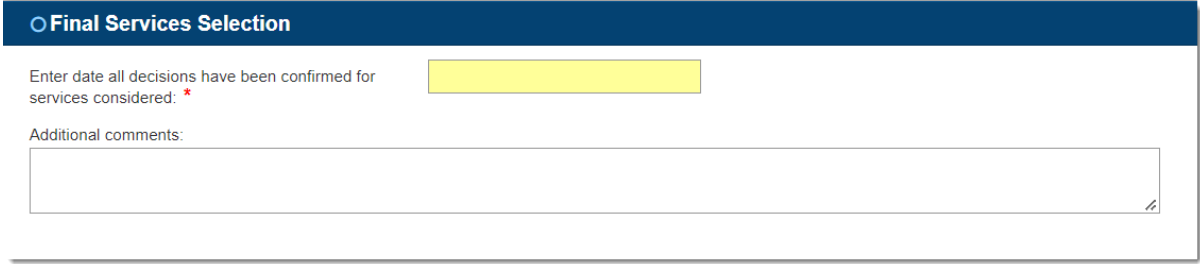
2. Click in the **Actions taken and outcome** field to enter details.
3. Click the **Date Completed** field to enter date.
4. If additional recommendations have been added by the RST add *Actions taken and outcome* in the space provided.
5. Click on **Save**. *The RST Referral Form main screen appears.*

9. CLOSE RST REFERRAL

The RST Referral is to be closed when recommendations and final disposition have been made.

9.1. Add Final Services Selection

1. Click on **Edit** for *Final Services Selection* section. *The Final Services Selection window appears.*

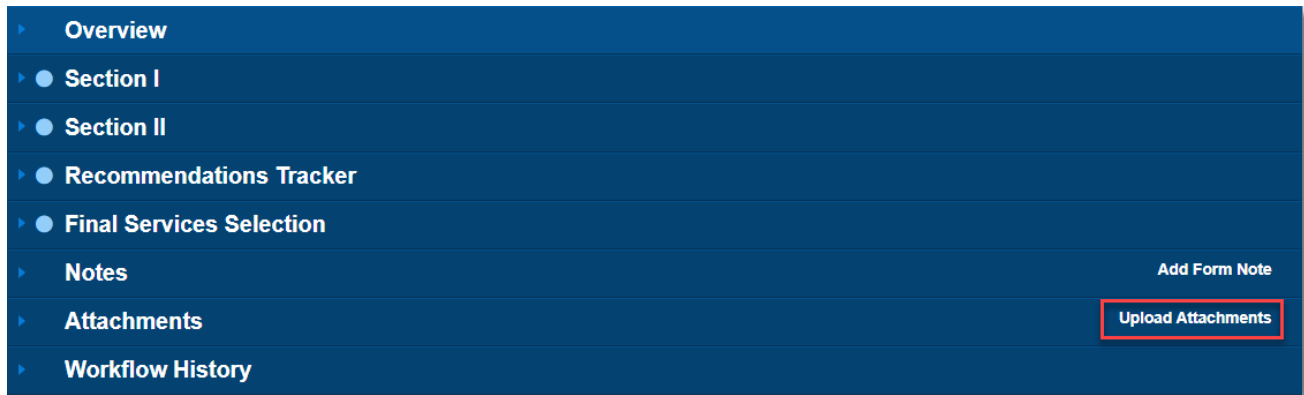


2. Click in the **Enter date all decisions have been confirmed for services considered** field to add the date.
3. Add *Additional comments* as necessary.
6. Click on **Save**. *The RST Referral Form main screen appears.*
4. Click on **Submit**. *The referral is submitted. The status of the referral updates to "Closed".*

10. UPLOAD ATTACHMENTS

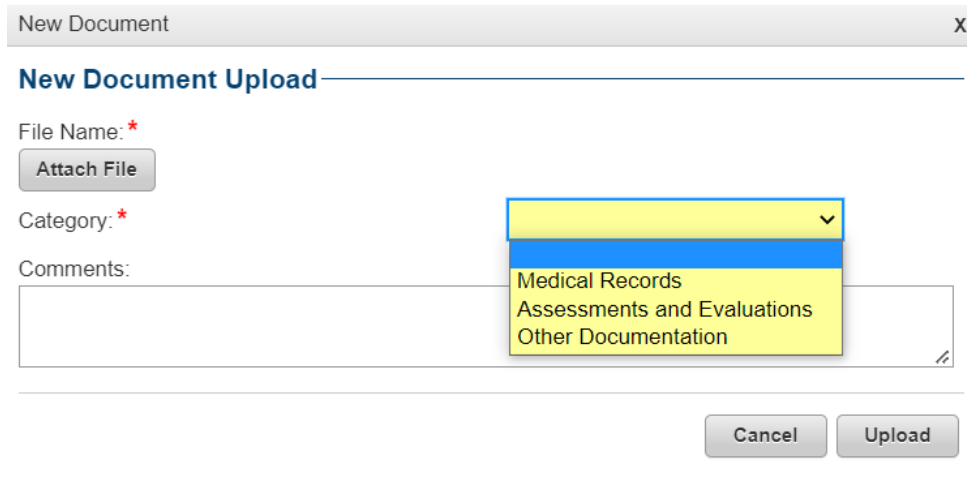
Attachments can be added to the RST Referral form at any point in the referral process.

10.1. Upload Attachments



The screenshot shows a dark blue navigation menu with the following items: Overview, Section I, Section II, Recommendations Tracker, Final Services Selection, Notes, Attachments, and Workflow History. The 'Attachments' item is highlighted with a red box, and an 'Upload Attachments' button is visible next to it. There is also an 'Add Form Note' button in the top right corner of the menu.

1. Click on **Upload Attachments**. *The New Document Upload dialog box appears.*



The screenshot shows the 'New Document Upload' dialog box. It has a title bar with 'New Document' and a close button. The main area is titled 'New Document Upload'. It contains the following fields and buttons:

- File Name:** A text input field with a red asterisk indicating it is required. Below it is an 'Attach File' button.
- Category:** A dropdown menu with a red asterisk indicating it is required. The dropdown is open, showing three options: 'Medical Records', 'Assessments and Evaluations', and 'Other Documentation'.
- Comments:** A text input field.
- Buttons:** 'Cancel' and 'Upload' buttons at the bottom right.

2. Click **Attach File** and browse to locate the attachment to upload.
3. Select the file to upload and click **Open**. *The file is attached and the file name appears above the Attach File button.*
4. Click the **Category** down arrow to select the appropriate category for the attachment.
5. Type a *description* for the attachment in the **Comments** field.
6. Click on **Upload**. *The file is attached and available in the Attachment section.*
7. Repeat steps 1 through 6 above to add additional attachments.

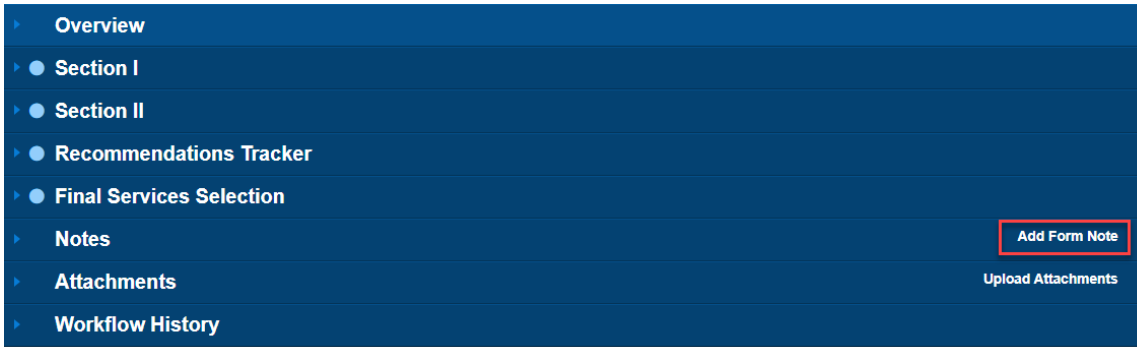
- Click the *Attachments* heading to expand the category and click on the Document Name to download added attachment(s).
- Click on **Edit** to add or edit a *Comment* or to change the *Category* for the attachment.
- Click on **Delete** to remove attachment.

Note: Attachments can only be edited or deleted by the person who uploaded it. Attachments cannot be edited or deleted once the referral is closed.

Attachments					Upload Attachments
Create Date	Document Name	Category	Description	Uploaded By	Action
10/16/2022	Medical Info for Eve.docx	Medical Records	10/16/2022 10:16 AM	10/16/2022 10:16 AM	Delete Edit


11. ADD FORM NOTES

Use *Form Notes* to communicate with the RST Members about the referral.



The screenshot shows a dark blue navigation menu with the following items: Overview, Section I, Section II, Recommendations Tracker, Final Services Selection, Notes, Attachments, and Workflow History. The 'Notes' item is selected and highlighted. To the right of the 'Notes' item, there is a red-bordered button labeled 'Add Form Note'. Below the 'Attachments' item, there is a link labeled 'Upload Attachments'.

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



The screenshot shows a 'New Form Note' dialog box. It has a title bar that says 'New Form Note'. Below the title bar, there is a label 'Note Content' followed by a red asterisk. Below the label is a large yellow text area. At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Save'.

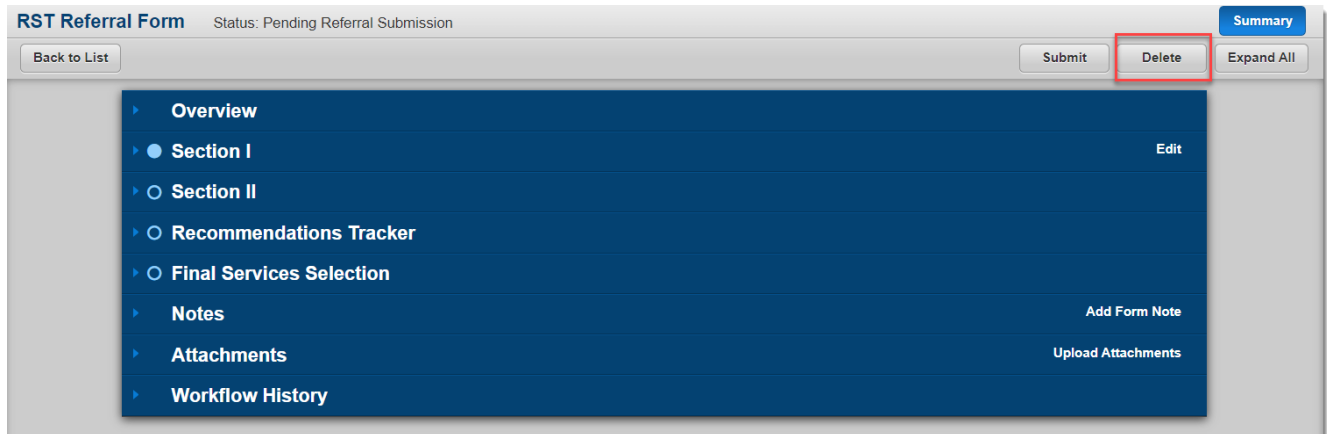
Note Form Notes cannot be edited or deleted once they are saved.

2. Enter the communication in the **Note Content** field.
3. Click on **Save**. *The RST Coordinator and CRCs will receive an Alert that there is a note attached to the referral. All RST Team members will be able to view the note.*

12. DELETE RST REFERRAL

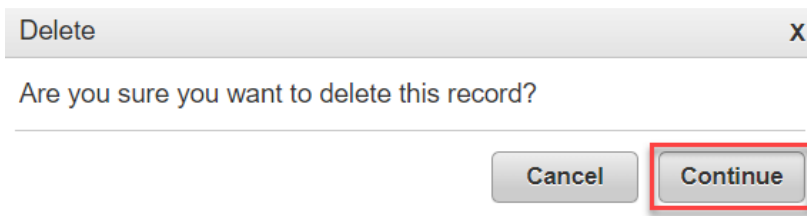
A referral can be deleted prior to submitting Section 1 of the referral. Once a referral has been submitted to the CRC it can no longer be deleted.

1. Click on the **Delete** button.



The screenshot shows the 'RST Referral Form' interface. At the top, it says 'Status: Pending Referral Submission'. On the right side, there are three buttons: 'Submit', 'Delete', and 'Expand All'. The 'Delete' button is highlighted with a red rectangle. Below the buttons is a sidebar menu with the following items: Overview, Section I (selected), Section II, Recommendations Tracker, Final Services Selection, Notes, Attachments, and Workflow History. On the right side of the sidebar, there are links for 'Edit', 'Add Form Note', and 'Upload Attachments'.

2. Click on **Continue**



The screenshot shows a confirmation dialog box titled 'Delete'. It contains the text 'Are you sure you want to delete this record?'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Continue'. The 'Continue' button is highlighted with a red rectangle.

The referral is removed from the system.

13. STATUSES AND ALERTS

13.1. RST Status Line and Descriptions

Status	Description
Pending referral submission	Initial status of the RST Referral when created by the SC/Submitter
Pending CRC Review	Status of the RST Referral once it is submitted to CRC for review and recommendations
Pending Submitter Review	Status of the RST Referral once the CRC submits recommendations to the SC/Submitter for review
Referral Closed	Status of the RST Referral when the SC/Submitter indicates that the CRC recommendations have resolved barriers and concerns
RST Requested	Status of the RST Referral when CRC submits request to RST Coordinator for an emergency meeting OR Status of the RST Referral when the SC/Submitter indicates that the CRC recommendations were not followed, or the recommendations did not resolve barriers and concerns
Pending Submitter Closure	Status of the RST Referral once the RST Coordinator submits recommendations to the SC/Submitter after RST Member meeting is held
Closed Action Needed	Status of the RST Referral when closed by SC, but the individual's desired option is not operating in the desired location (further action required)
Closed Timeframe Exceeded	Status of the RST Referral when the referral is closed by SC, but desired residential option is not located or made available within 9 months of the RST meeting
Closed	Status of the RST Referral after RST recommendations have been completed by SC/Submitter OR Status after RST Coordinator or CRC submits after either (1) Closed Action Needed status

13.1. RST Referral Alerts

Support Coordinators with the SC Approver Role in WaMS will receive the following Alerts during the referral process:

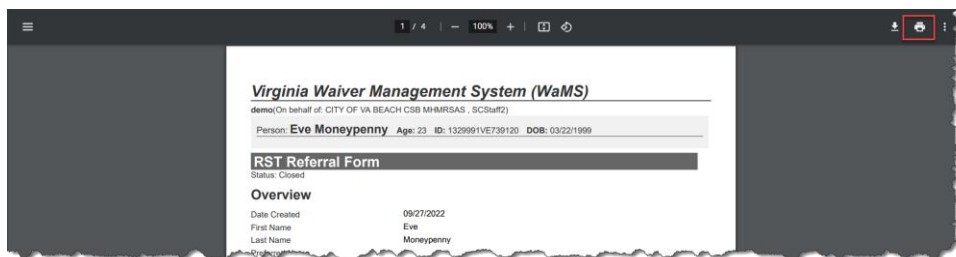
Alert	Description
A RST form is awaiting review	When a referral that has been submitted for review has been sent back with recommendations
A RST Form is Pending Submitter Closure. Please review and close within 15 days	After the RST meeting is held, the RST Coordinator sends with recommendations
RST form is still Pending Submitter Closure. Please review and close the form.	After 15 days has passed since referral sent for closure and it has not been submitted for closure
RST Form Note has been sent to you.	When a note has been added in the Form Notes section by the RST Coordinator or the CRC with additional information or details about the referral

14. PRINT REFERRAL

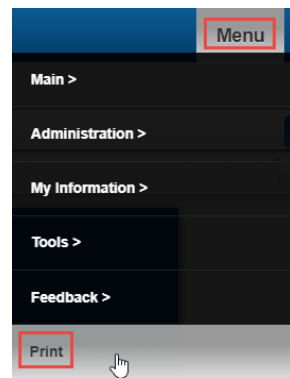
The RST Referral can be printed and/or saved as a PDF.

14.1. Print RST Referral

1. Click on **Menu, Print**. *The RST Referral opens in a new browser window.*



2. Press **Ctrl+P** (or click on the printer icon) and click on **Print** button to *download or save* the PDF document.
3. Click the **X** to close the window. *You are returned to WaMS.*



15. ACRONYMS AND ABBREVIATIONS

Acronym / Abbreviation	Definition / Name
BI	Building Independence
CL	Community Living
CSB	Community Services Board
CRCs	Community Resource Consultants
DBHDS	Department of Behavioral Health & Developmental Services
DD	Developmental Disability
FIS	Family and Individual Supports
ISP	Individual Support Plan
RST	Regional Support Team
SC/CM	Support Coordinator / Case Manager (a.k.a. Submitter)
SDM	Substitute Decision Maker
VIC	Virginia Informed Choice form
WaMS	Waiver Management System

16. GET HELP / RESOURCES

16.1. WaMS Help Desk

Call the **WaMS Help Desk** for all “how-to” questions about the VIC or RST Referral or any technical problems with WaMS at **844-4-VA-WaMS** (844-482-9267); or email the WaMS Help Desk at helpdesk@wamsvirginia.org. The help desk hours of operation are 7:00 AM – 7:00 PM EST.

16.2. Community Resource Consultants (CRCs)

Your Regional CRCs are available for assistance with VIC and RST Referral process and content.

INDEX

About the RST Referral	1	Print.....	25
Acronyms and Abbreviations.....	26	Recommendations Tracker	17
Alerts.....	16	Search Filter	14
Help and Resources		Section I.....	10
WaMS Help Desk	27	Edit	10
Performance Contract	1	Save	12
RST Referral	8	Submit	12
Alerts.....	24	Section II.....	15
Attachments		Edit	15
Delete Attachment	20	Status	14
Upload.....	19	Status Lines	23
Close.....	18	When to Submit	1
Final Services Selection.....	18	Workflow.....	6
Create New	8	Workflow History	7, 16
Delete Referral.....	22	VIC Form.....	2
Form Notes		About.....	2
Add.....	21	Create New	2, 5
Locate Referrals	13	Discard	5
Alerts.....	13	Save	3
My Lists	13	Sign.....	4
Overview	9	Submit	5

