Procedure for the IDF Extension Form in Therap:

MSC/QIDP/PC/SEMP will attach the IDF Extension form upon waiver enrollment, and then annually thereafter. The MSC for individuals receiving service with Saratoga Bridges will be responsible for completing the form and attachments. For people receiving MSC services through other agencies, and resides in Saratoga Bridges residences, the Residential QIDP will complete the form and attach the LCED. For all other individuals, the Day/SEMP/FSS QIDP will complete the form and attach the LCED.

1. Open the Individual tab, scroll down to the ISP and Habilitation Plan section, left-click “New” for IDF Extension. Upon screen refresh, “Select Program for IDF Extension” will show in the top region of the page above a list of programs.
2. Select the program from the list. The screen will refresh and “Select Individual for IDF Extension” will appear above an entry for the program selected in Step 1 of these instructions.
3. Select the individual for whom you are completing this form. Again, the screen refreshes to reveal the page’s title, “IDF Extension Form”. You will notice that the form has four regions, each highlighted, “IDF Extension Information”, “LCED”, “MSC Agreement”, and “IRMA”. Proceed to provide the IDF Extension Information.
4. Complete the field for the individual’s TABS ID.
5. Select the Primary MSC from the drop down list of names. NOTE: “External, MSC” appears among the entries. Use this when the individual receives MSC services from a non-Saratoga Bridges MSC.
6. Turning your attention to the tabular region to the right of “Other MSC”, select from among the available items by left-clicking the “+” shown to the right of the other MSC’s name. Remove the name from the selected items list by left-clicking the “-“.

**If information for Steps 7 through 10 is known, complete the fields. If not, skip to Step 11**.

1. Complete the fields for “MSC Enrollment Date”, “HCBS Enrollment Date”, and “Date of Initial ISP”.
2. Indicate whether the person lives in an IRA.
3. Characterize the IRA as either supportive or supervised using the appropriate field.
4. Check the box next to “Class Member” (if applicable).
5. Proceed to the section for LCED and provide the date. Indicate whether the LCED is the initial one, or whether this is a renewal. Complete the text box for “Signed By”, and attach a scan of the LCED form.
6. For individuals receiving Saratoga Bridges MSC services exclusively, only Saratoga Bridges MSCs will provide the MSC Agreement Date and attach the MSC Agreement using the “Attach” button. DO NOT USE the field for MSC Review Date.
7. **DO NOT USE** the IRMA section.
8. Left-click the “Save”, “Submit”, or “Approve” button to yield the consequences already described in previous policy.

**To update the LCED form on the IDF Extension module:**

1. Open the Individual tab, scroll down to the ISP and Habilitation Plan section, left-click “Search” in the IDF Extension module. Upon screen refresh, enter the name of the individual whose IDF extension you will be modifying. The “Search” button is located on the bottom right-hand corner.
2. A list of all IDF Extension forms entered into the system will appear and you should select the one to be modified.
3. The form will open. Review the entire form for accuracy.
4. Attach the (revised/new) LCED form using the procedures described in Step 11 above.
   1. LCED forms are to be kept for seven years. Those older than seven years may be removed. The “Remove” button to the right of the attachment will remove the form.
5. Click “Save”

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