APD iConnect Provider Tips & Tricks
The Basics

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Time: 1:00 PM - 2:00 PM

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Contents

Multi-Factor Authentication (MFA) - ID PASS

For Agency Owners, set up employees in ID PASS as soon as possible. Remember, they will not appear as workers, under the Worker Tab, of your Agency Record until they complete all the steps and log into APD iConnect. It is important to remember, the MFA request that is sent is time sensitive, so employees need to respond and complete all the steps as soon as the request is received so that the system can complete the registration process.

Agency Staff Training

Agency Owners are responsible for training their employees on activities related to the delivery of respite or personal supports in APD iConnect.

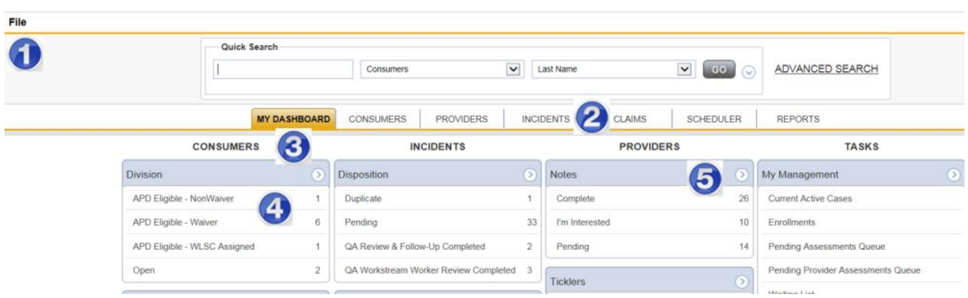
- Roles are specific and set up for the employee by the Agency Owner in ID PASS, so an employee only needs training on what their role requires
- Conduct small group training with specific roles or employees
- Group employees together according to their level of computer expertise. For example, those who are computer savvy are grouped together in larger groups. Those who are less computer savvy are grouped in small groups
- Send MFA request to employees at least two days in advance of training. This will allow the staff to complete the steps, login and appear under the Worker Tab in APD iConnect. The Agency Owner can use the EVV Scheduling Tab to assign employees to consumers and make the most of the training time.

Advantages of Using Your My Dashboard

My Dashboard is the user's home page and where tasks can be managed. When users first log in, they will begin from here. Keep in mind that any user's **My Dashboard** page may differ from that of a co-worker's. Roles determine which features a user may have.

My Dashboard Screen Elements

There are several parts of the **My Dashboard** screen, as shown in the screenshot below:



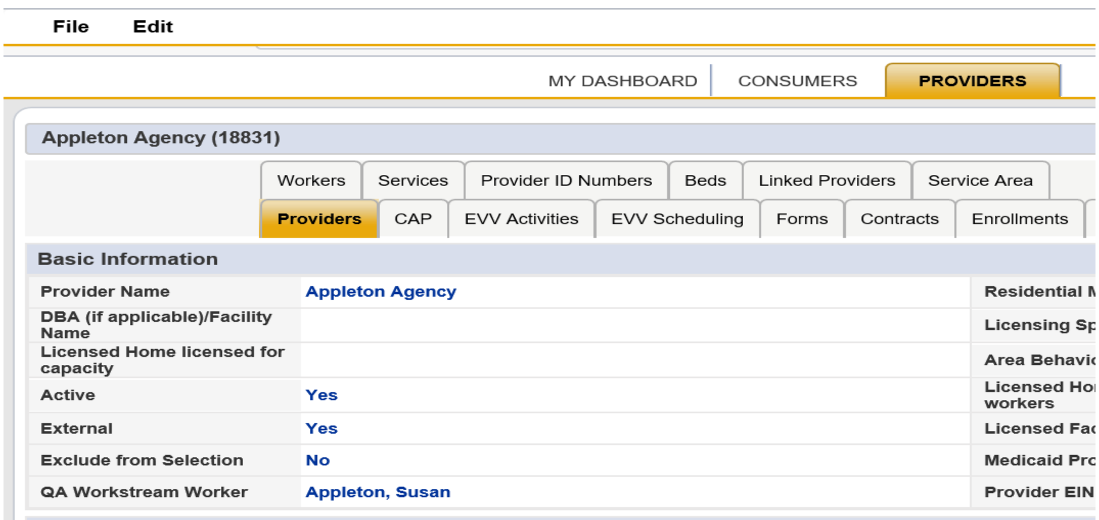
	The File menu is located throughout the program. Items on the File menu vary, depending on what you are doing. One of the more common functions you will use is the **File** > **Add Notes** and **File** > **Save and Close Notes**.
	The tabs along the top of the screen are called **Chapters**. A chapter is like a section of the program. To move to another chapter, just click it.

3	**My Dashboard** is divided into areas for consumers, incidents, providers and tasks. You may see all or just some of these areas.
4	Within each area are boxes that contain information. These are referred to as **Panes**.
5	Each pane includes a down arrow. When you click the down arrow, items in the pane are collapsed. This is helpful if you need more space on your screen. To expand the items in the pane, click the now right-facing arrow.

Many areas of the program allow you to collapse sections (panes). Click the down arrow in the circle. When you click it, it becomes a right-facing arrow

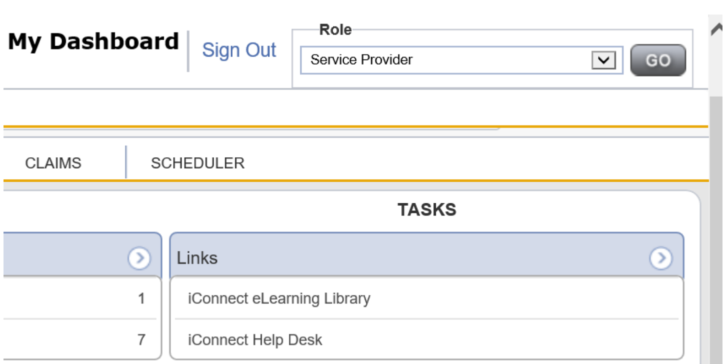
Provider Enrollment QA Workstream Worker

This is the point of contact in Regional Provider Enrollment point of contact.



eLearning Library

The eLearning Library can be accessed via your My Dashboard, Task column, in APD iConnect or via the [APD Website](). When working in APD iConnect, click on iConnect Help Desk to retrieve the number to contact the iConnect Support Desk.



On the [APD Website](), resources are available on:

- APD iConnect Learning Resources Page
- APD iConnect Provider Library
- APD iConnect Frequently Asked Questions (FAQs) Page
- APD iConnect Systems Enhancements and Updates (updated every Monday)

Switching Roles

Roles define a set of capabilities you have within APD iConnect, and each Role performs different functions. When switching roles if you do not hit GO, you will not have changed to the new role. What you see may be different and is an indicator to check your role.

Switch Role to Service Provider Admin-QA

a. When you switch roles, the following process must be followed:

b. Go to the upper-right portion of the screen, in the **Role field**

c. Click the down arrow and then select the **Role** you want to work with. You may not see all the roles as displayed in the screenshot below

Provider Roles Capabilities

Service Provider Role

- Grants access to your agency record
- Should be limited to only you and designated staff (authorized in writing to act on your behalf

Provider EVV Manager

Limited access to your agency

- Can see authorizations
- Has access to EVV Scheduling
- Can review EVV activities and submit EVV claims

Has access to consumer records for whom you have an authorization
Can see and submit claims

Service Provider QA Admin

Some access to portions of provider record

- Designed for admin support who may assist with agency management
- Some access is view-only
- Some access is add/edit
    - Can Edit provider demographics
    - Can Complete forms
    - Can Add note
    - Can Assign supervisors for employees
    - Can Submit and view claims

Service Provider Worker

Cannot see agency record at all

Has access to consumer records for whom you have an authorization

- Access is limited to information needed to deliver authorized services and add documentation
- Can add notes for WSC to see

Cannot access agency authorizations or claims

Role is needed for all EVV Workers

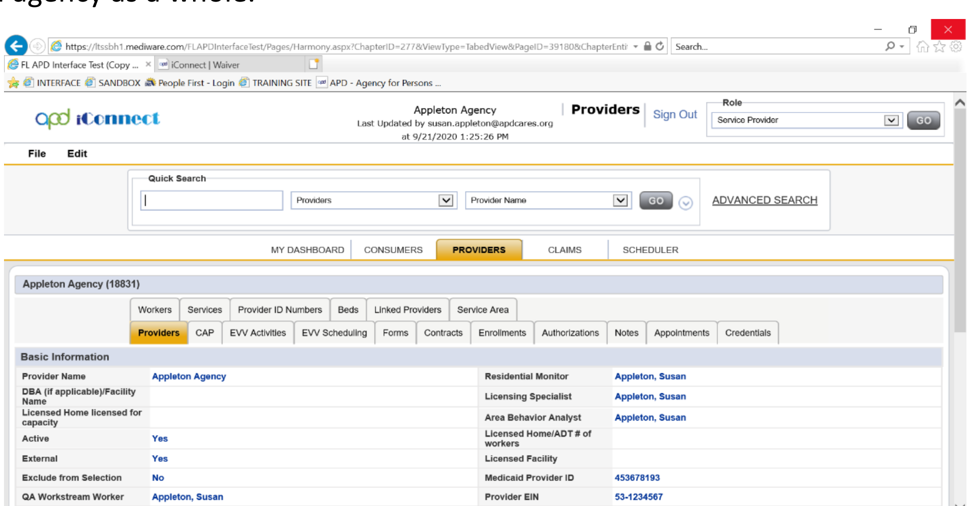
Billing Agent

For persons who will submit claims on your behalf. Can be 3rd party or an employee

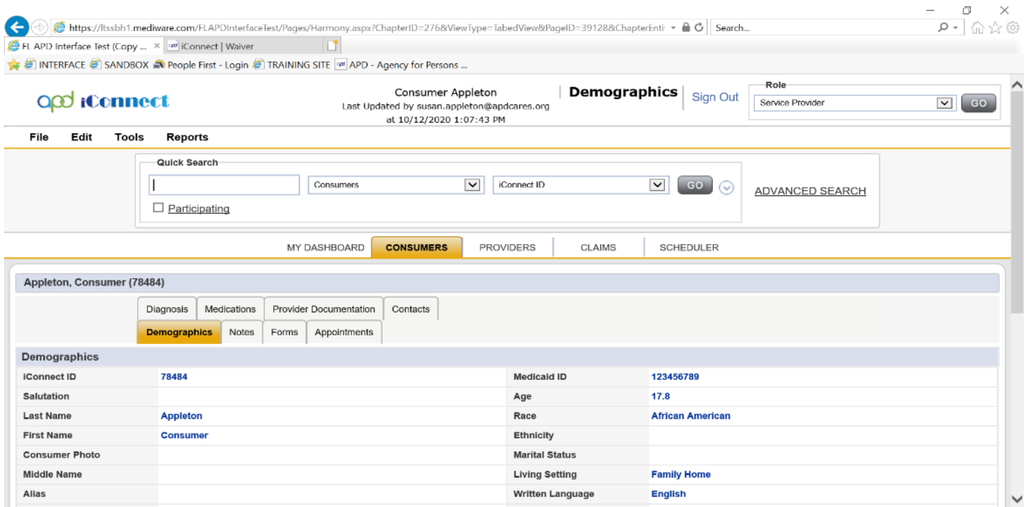
- Very limited access to agency
    - Provider documentation
    - Access to Notes to communicate with you
- No access to consumer records
- Can see and submit claims

Provider Record versus Consumer Record View

Verify information in Provider record. The provider record allows you to view your record agency as a whole.



The consumer record allows you to view information on only the consumer whose account you have accessed.



Electronic Visit Verification

To see EVV Workers you must be in the Service Provider Role > Worker Tab. Workers, including the Solo Provider or Agency Owner are added once APD iConnect is accessed for the first time.

EVV Scheduling - Assign/Unassign EVV Workers to EVV Service Authorizations

Typically, each EVV authorized service will be assigned a primary and backup worker to limit the number of individuals that can see the consumer and the services they're receiving but doesn't require a supervisor to continually update assignments when primary workers are on vacation or otherwise need coverage by a peer. Provider EVV Managers can associate their EVV workers, who are the individuals that will render the services to consumers, to EVV service authorizations from the EVV Scheduling tab. Assigning an EVV Worker from the EVV Scheduling tab controls which consumers are visible to the workers in the Mobile Site.

1. Navigate to the Provider record and click on the EVV Scheduling tab.
2. If desired, filter to see the desired consumer(s) as described in the previous section.
3. Check the box to the right of each EVV authorization for which an EVV worker needs to be assigned, modified, or removed.

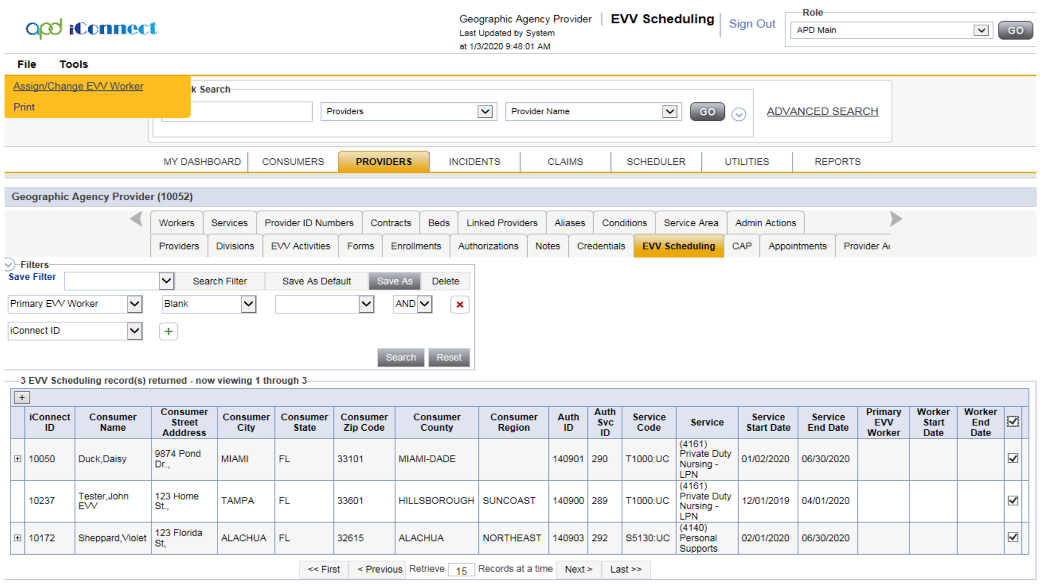
    a. Checking the box at the top of the grid and will select all service authorizations on the screen.

3 EVV Scheduling record(s) returned - now viewing 1 through 3

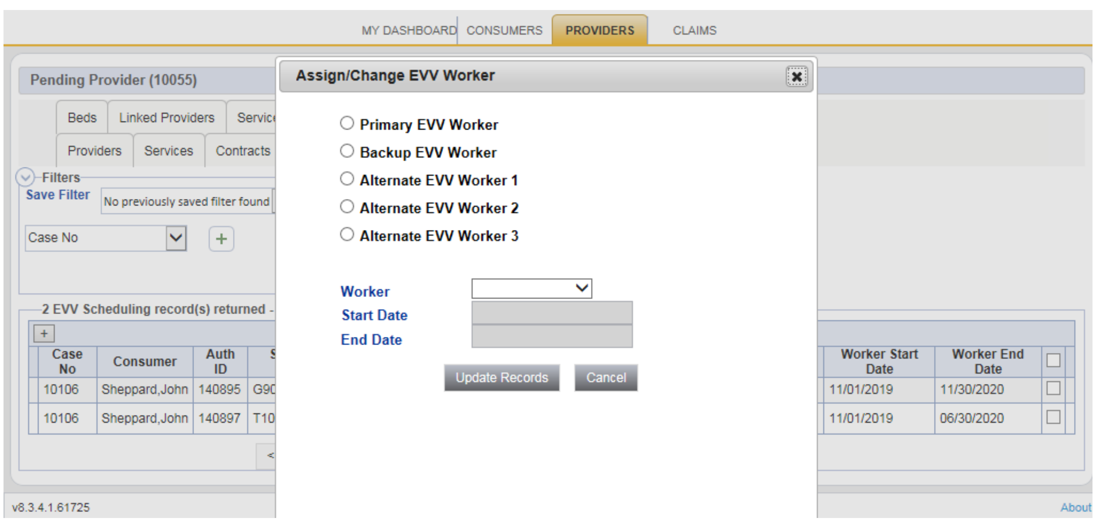
	iConnect ID	Consumer Name	Consumer Street Adddress	Consumer City	Consumer State	Consumer Zip Code	Consumer County	Consumer Region	Auth ID	Auth Svc ID	Service Code	Service	Service Start Date	Service End Date	Primary EVV Worker	Worker Start Date	Worker End Date	☑
⊞	10050	Duck,Daisy	9874 Pond Dr.,	MIAMI	FL	33101	MIAMI-DADE		140901	290	T1000:UC	(4161) Private Duty Nursing - LPN	01/02/2020	06/30/2020				☑
	10237	Tester,John EVV	123 Home St.,	TAMPA	FL	33601	HILLSBOROUGH	SUNCOAST	140900	289	T1000:UC	(4161) Private Duty Nursing - LPN	12/01/2019	04/01/2020				☑
⊞	10172	Sheppard,Violet	123 Florida St,	ALACHUA	FL	32615	ALACHUA	NORTHEAST	140903	292	S5130:UC	(4140) Personal Supports	02/01/2020	06/30/2020				☑

<< First < Previous Retrieve 15 Records at a time Next > Last >>

4. Select “Assign/Change EVV Worker” from the File menu.



5. The “Assign/Change EVV Worker” dialog box will be displayed.

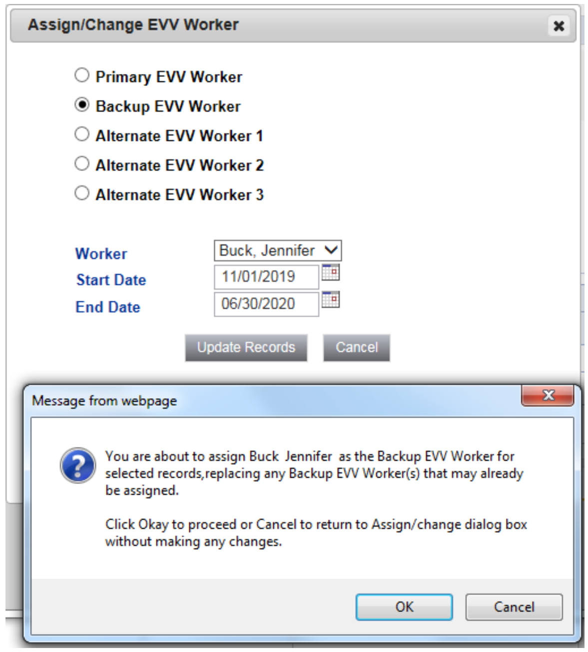


6. To assign a worker when one is not already assigned or change the assigned worker from one worker to another, select the type of worker to be assigned/updated.
7. Select the worker to be assigned to the selected records.
8. Enter a Worker Start Date and End Date.
    a. If dates are populated, they are used to grant or remove visibility to consumer within the Mobile Site.

    b. If no dates are populated, the assigned EVV workers will always be able to see the consumer in the Mobile Site.

c. Visibility of the EVV services in the Mobile Site is dependent on the start date of the service and the current date, not the Worker Start and End dates.

9. Click “Update Records” to assign/change the assigned worker or “Cancel” to return to the EVV Scheduling tab without making any changes.



10. A confirmation message will be displayed. Click “Okay” to proceed or “Cancel’ to abort the changes.

11. The system will assign the specified EVV worker to each selected record as the specified worker type. If another worker was already assigned to the record, they will be replaced by the new worker.

12. To remove an EVV worker without adding a replacement

    a. Select the type of EVV worker (Primary, Back-up, etc.) to be removed.

    b. Make sure the worker field is blank.

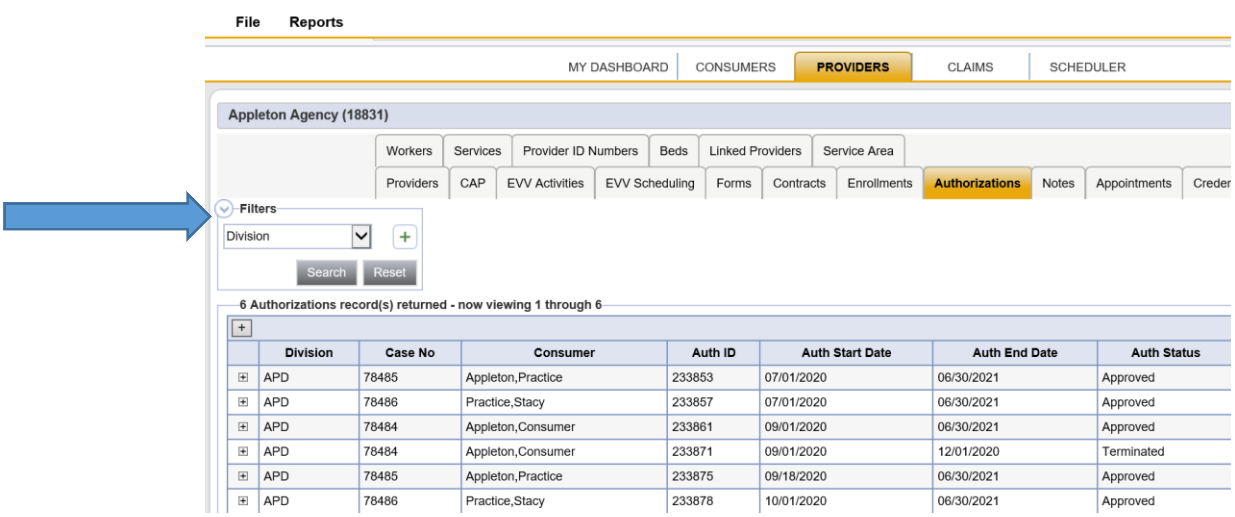
    c. Click “Update Records” to remove the assigned worker(s) or “Cancel” to return to the EVV Scheduling tab without making any changes.

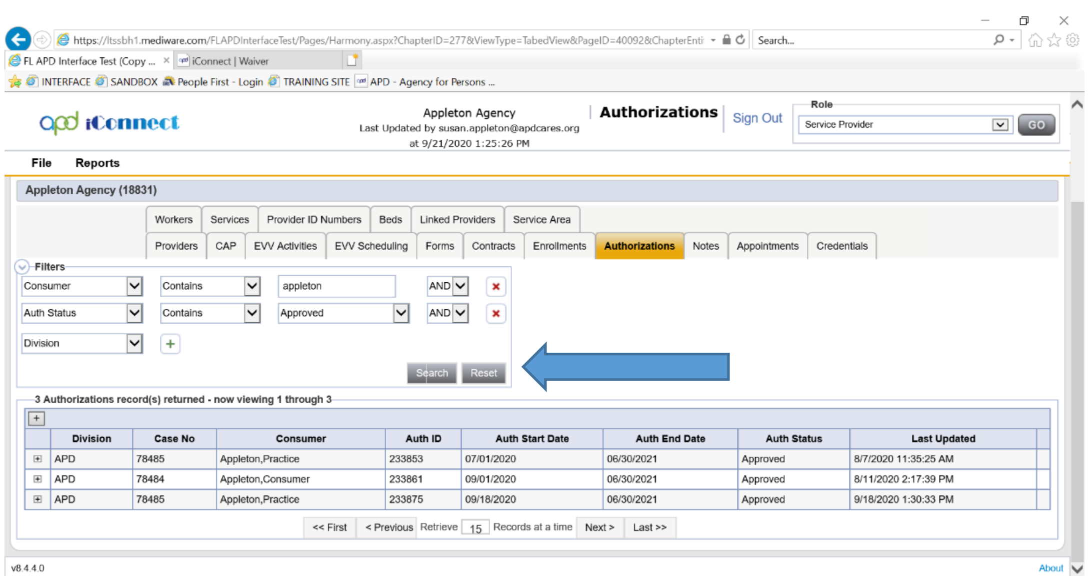
    d. A confirmation message will be displayed. Click “Okay” to proceed or “Cancel’ to abort the changes.

    e. The system will remove any existing workers and, if present, their Worker Start and End Dates.

Using Filters to Search for Authorizations in Provider Record

1. Click on the Authorizations tab in the Provider Record
2. A list view of authorizations will appear
3. Locate the filters
4. To add filter fields, click on the plus sign
5. Define your search field. For example, Consumer and Auth Status
6. Click Search and APD iConnect will generate a filtered list to respond to your input





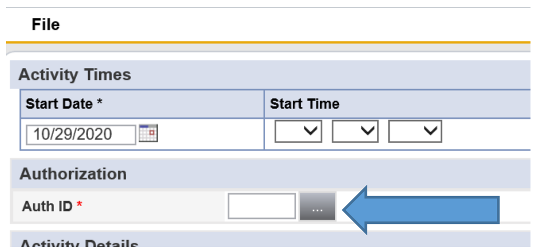
7. Click into the authorization to view details

Manually Entering Service Log

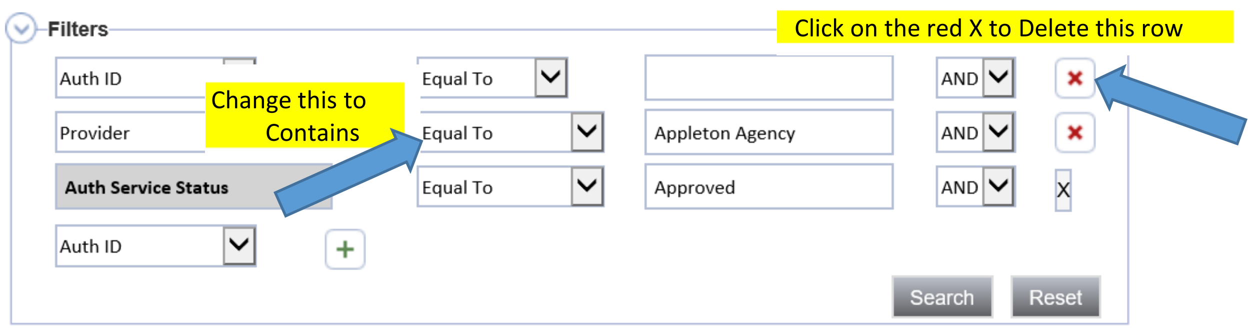
Manual service log entry is completed, using the Service Provider Role. Manual service logs are entered under the Provider Documentation tab in the Consumer Record. Once EVV is live in APD iConnect, EVV services will be delivered by the EVV Worker in the EVV mobile site and uploaded into APD iConnect under the EVV Activities tab. The eLearning library has a video and the accompanying document to add a service log. This review will reference the document [Adding a Service Log in APD iConnect.]

Using Filters to Search for Authorizations when Adding Service Log

After entering service start date and times, the Service Provider will click on ellipsis Auth ID to access authorizations.



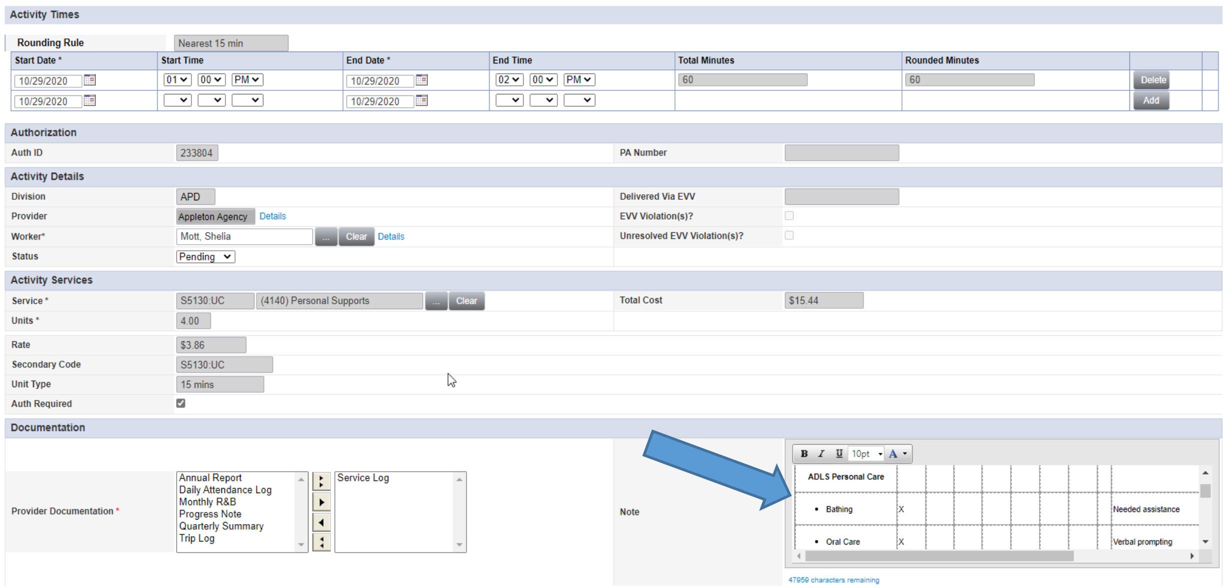
Should the authorizations not show as a list view, change the filters as indicated below, then click search to generate the list of authorizations that apply.



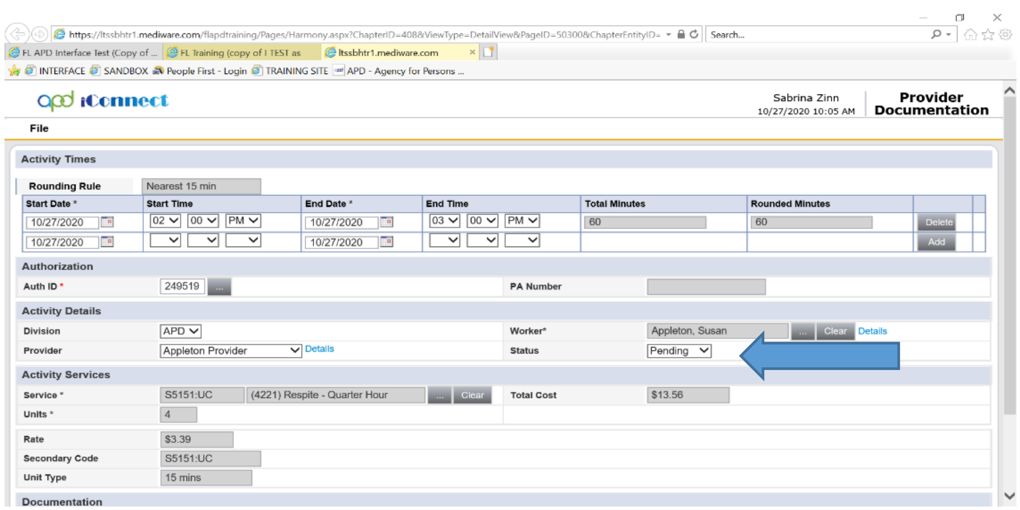
- Remember to click into + sign to see all services and pull all data into the provider documentation
- One Auth ID per provider
- Each service has own Auth Service ID

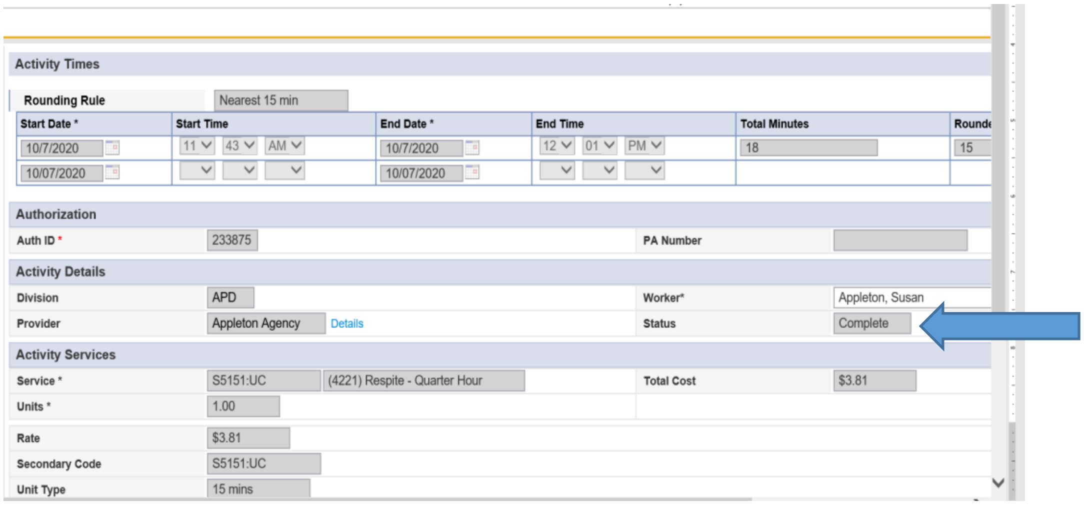
Copy/Paste Service Log Entry Notes from Word Documents

The Note field in Provider Documentation is now a rich text field, allowing that providers to copy their forms from Word into the field. The notes from the form will copy and paste into the field as is. The provider will have to adjust the entry to ensure it is aligned and grammatically correctly.



Difference between Pending vs Complete Status for Provider Documentation





Activity Times

Rounding Rule	Nearest 15 min

Start Date *	Start Time	End Date *	End Time	Total Minutes	Rounde
10/7/2020	11 43 AM	10/7/2020	12 01 PM	18	15
10/07/2020		10/07/2020			

Authorization

Auth ID *	233875	PA Number	

Activity Details

Division	APD	Worker*	Appleton, Susan
Provider	Appleton Agency Details	Status	Complete

Activity Services

Service *	S5151:UC (4221) Respite - Quarter Hour	Total Cost	$3.81
Units *	1.00		
Rate	$3.81		
Secondary Code	S5151:UC		
Unit Type	15 mins		