Utilizing Notes in iConnect

Introduction

Notes in iConnect are a way for Providers, WSCs and APD staff to communicate and share information while keeping records in either the Provider Record or the Consumer Record. Depending on the workflow, there are specific Note Types, Note Sub-Types, Descriptions, Status, Attachments and Recipients required.

This job aid will encompass the basic skills in using the Note function in iConnect. It is important to visit the appropriate Chapters or Job Aids for the specific tasks and workflows to ensure you use the appropriate responses in the fields.

Objective of this job aid: to understand the importance of using Notes in iConnect and the importance of utilizing the appropriate response in the corresponding field options.

Specific Workflows that use Notes in iConnect:

Behavior

Employment Services - IFS

Expansion Requests

Home Health Care Services (HHCS)

ICF Transitions

Life Skills Development

Quality Assurance

Reactive Strategies

Residential Habilitation

Residential Planning

Supply, Equipment, Adaptation, Emergency Response System and Dental

Supported Living

Therapeutic and Residential Nursing
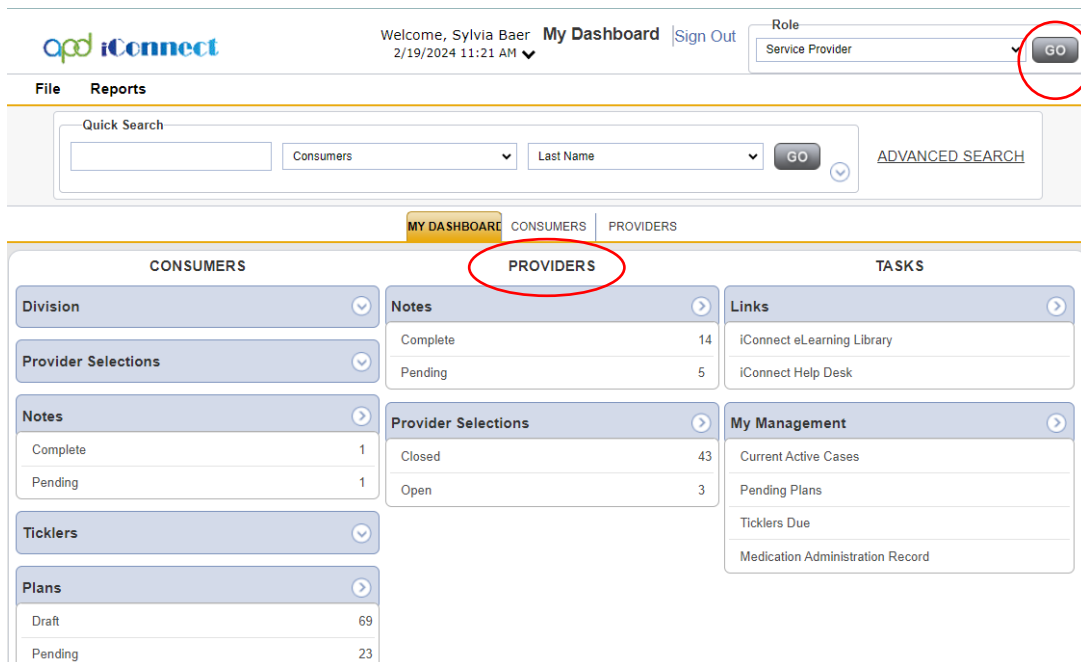
Waiver Support Coordination (WSC)

Note Locations in iConnect – Provider Record

Your Role in iConnect will determine your access.

- The Service Provider Role will have access to both the Provider Notes and Consumer Notes.

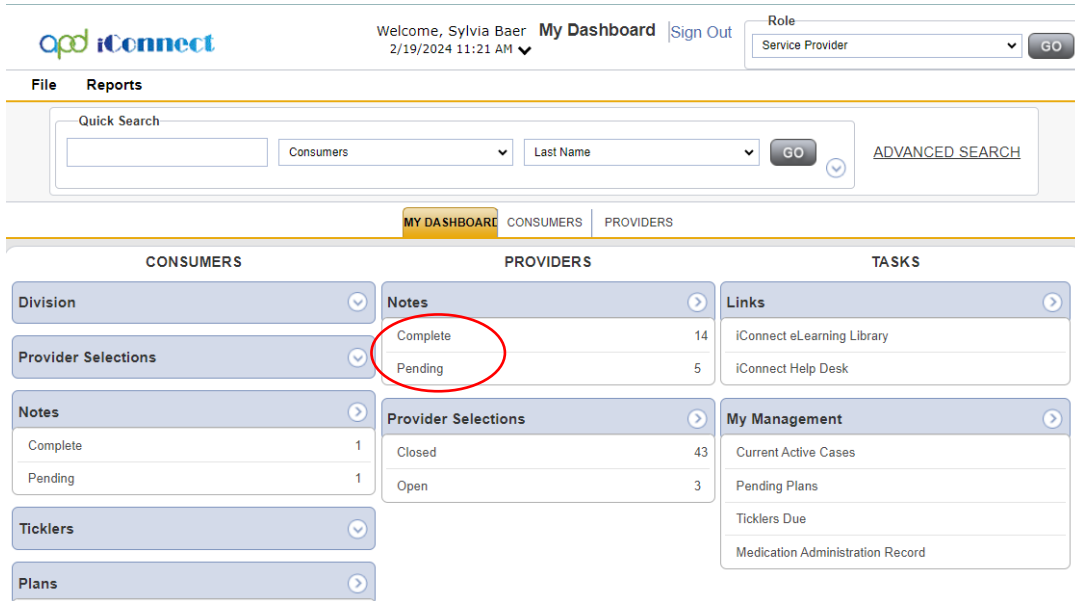- WSCs, Service Provider Workers and Provider EVV Managers will only have access to the Consumer's Notes.

1. To begin, log into iConnect and set Role = **Service Provider**. Click **Go.** When you land on **My Dashboard**, you will see columns labeled CONSUMERS and PROVIDERS. Under those corresponding columns are Notes. Notes under the CONSUMERS heading are Notes that were created on the Consumer Record and are part of that consumer's central record. Notes under the Provider Record are notes that were created in the Provider Record and are part of the Provider's record. *If you do not see the heading labeled Notes, that indicates that you do not have any Unread Notes.*

   a. *It is important to remember that consumer case management related notes should not be included within the provider record and vice versa. Follow the appropriate workflows for plans of remediation and corrective action plans.*

2. To view either Complete Notes or Pending Notes, click the corresponding hyperlink.

3. Click the hyperlink of the Note you want to read. The Note will show once selected.

4. To remove the Note from your My Dashboard, navigate to **Tools** > **Mark as Read and Close.**

To locate any Note from your Provider Record marked as Read, navigate to your
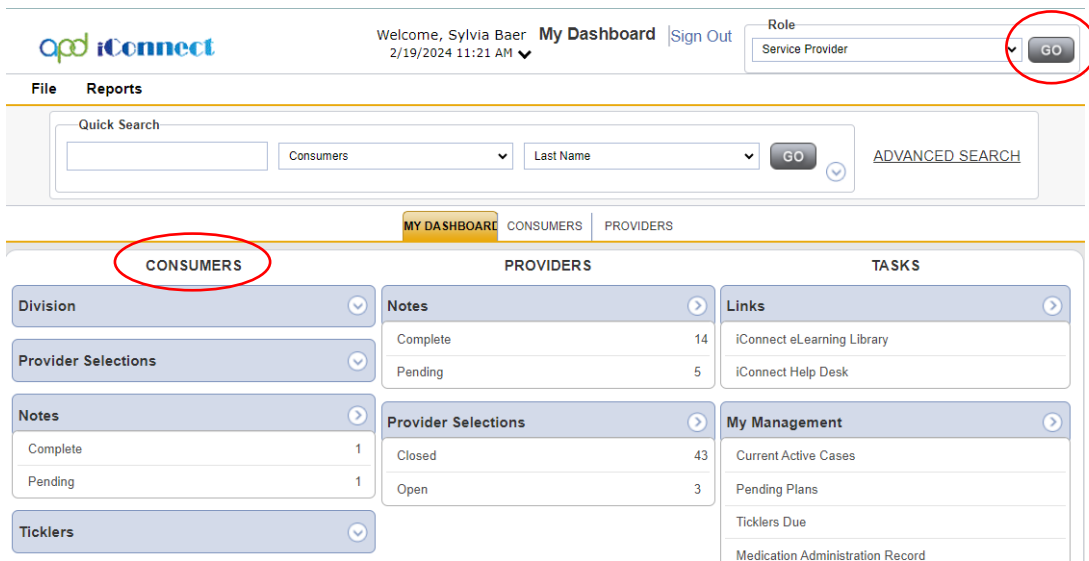*Provider Record > Notes tab to view any previously Read Notes.*
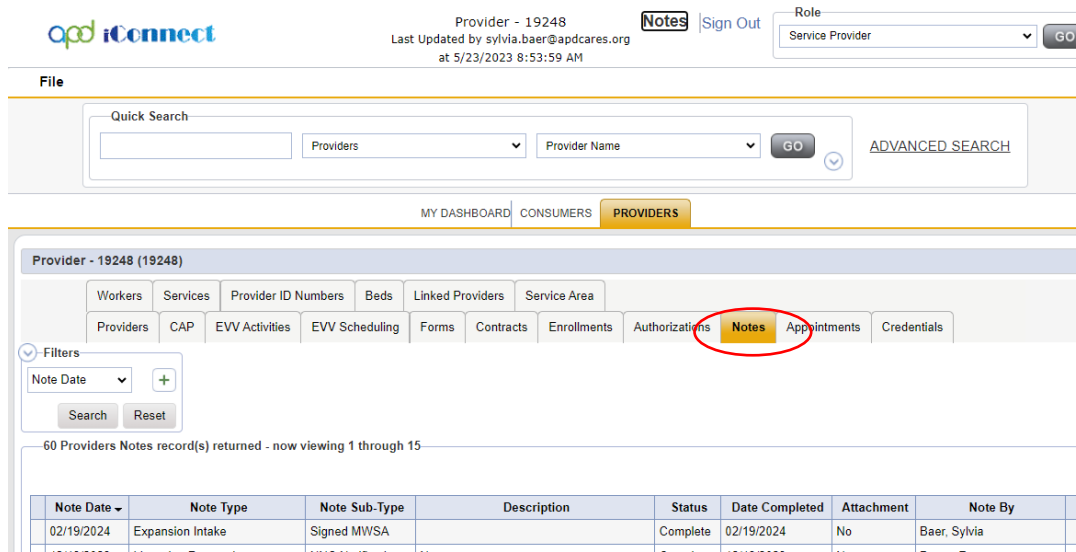
Note Locations in iConnect – Consumer Record

Your Role in iConnect will determine your access. Service Provider, WSC, Service Provider Worker and Provider EVV Manager will have access to the Consumer's Notes.

1. To begin, log into iConnect and set Role = **Service Provider, Service Provider Worker, or WSC**. Click **Go.** When you land on **My Dashboard**, you will see a column labeled CONSUMERS. Notes under the CONSUMERS heading are Notes that were created on the Consumer Record and are part of that consumer's central record. *If you do not see the heading labeled Notes, that indicates that you do not have any Unread Notes.*

   a. *It is important to remember that consumer case management related notes should not be included within the provider record and vice versa. Follow the appropriate workflows for plans of remediation and corrective action plans.*

2. To view either Complete Notes or Pending Notes, click the corresponding hyperlink.

3. Click the hyperlink of the Note you want to read. Once selected, your note will appear.

4. To remove the Note from your My Dashboard, navigate to **Tools** > **Mark as Read and Close.** *If you mark a Support Plan or Support Plan Provider Copy Note as Read, you will no longer have access to that Note, therefore make sure to download that document prior to marking it as read OR leave it as unread for future access.*
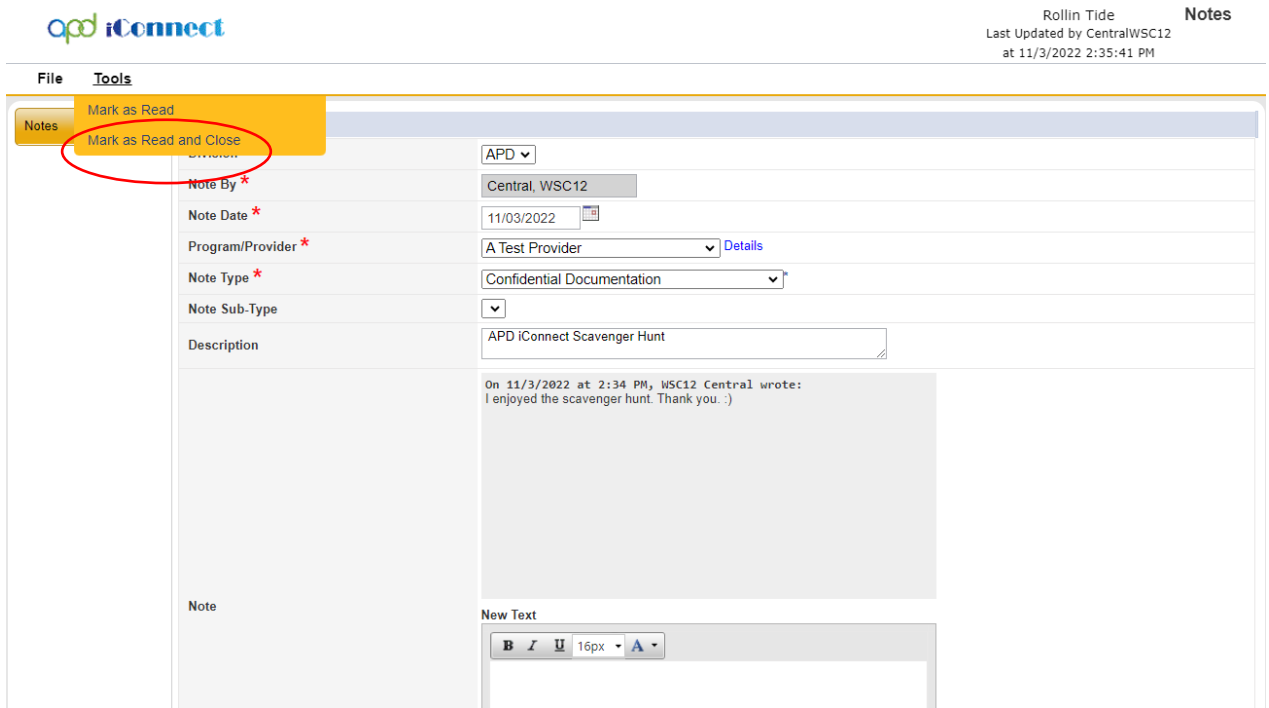
*To locate a Note from the Consumer Record marked as Read, navigate to the **Consumer Record** > **Notes** tab to view any previously Read Notes. This will **NOT** work with Support Plan or Support Plan Provider Copy Note Types.*
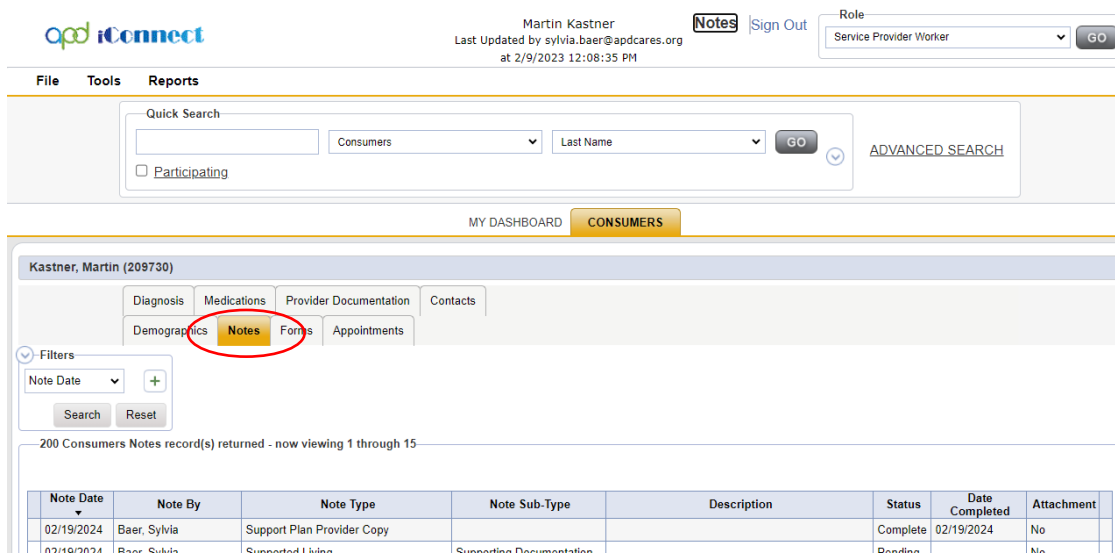
Creating a Note in iConnect

Notes are a way for service providers and WSCs to communicate with APD staff and each other through iConnect. It is crucial that if a Note is needed to be read by an individual that they are added as a Note Recipient. A Note without a Note Recipient is similar to an email in the Drafts folder, no one knows it is there. When creating Notes, it is imperative to follow the proper workflow to ensure that each step is followed. Utilizing the incorrect Note Type or Note Sub-Type could cause issues for the recipient, which could potentially jeopardize services for our consumers. Utilize the links provided earlier to ensure that you follow the appropriate workflow.
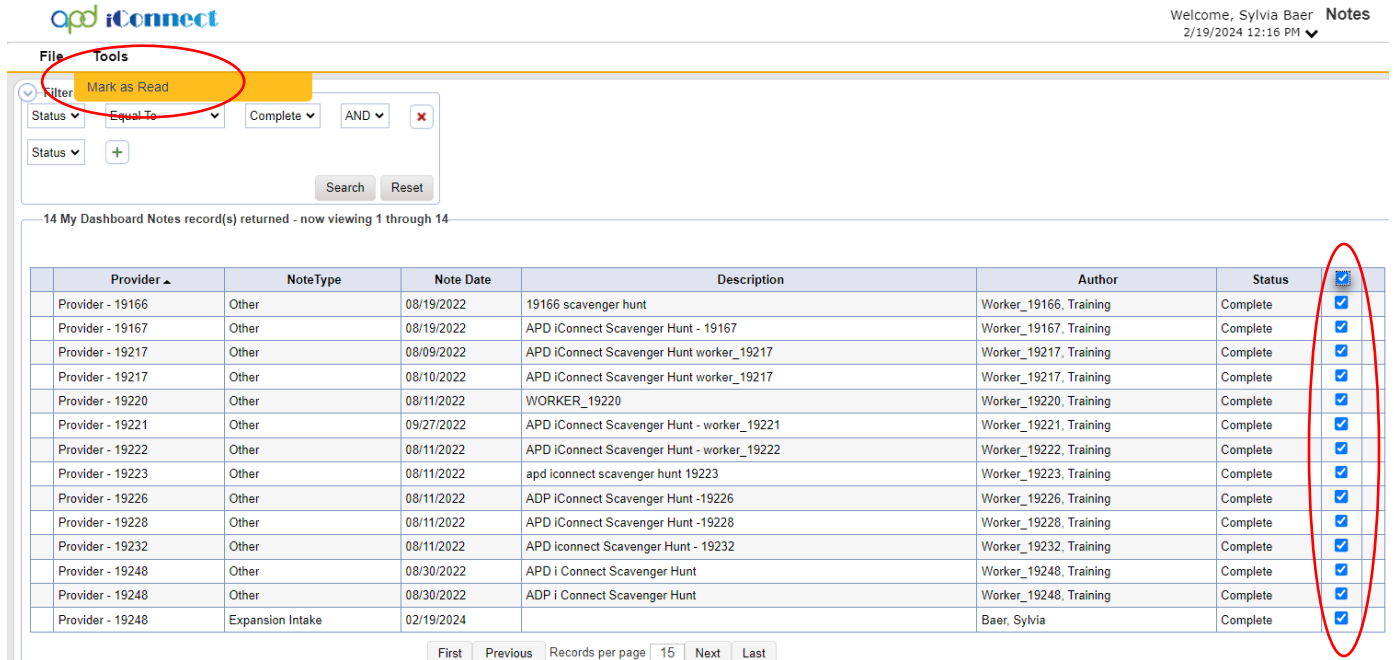
Best Practices with Notes in iConnect

There are some best practices to help ensure that all iConnect users are successful with iConnect.

1. Apart from the Support Plan Provider Copy Note and the Support Plan Notes (for Providers of Non-WSC services), it is best practice for ALL providers to mark Notes as Read to clear your My Dashboard.

    a. Notes can also be marked as read from the list view of your Notes from your My Dashboard.

        i. Once logged into iConnect, select your appropriate Role and press **Go**. On your My Dashboard, you will click the Notes you want to view (Providers/Consumers and Pending or Complete).
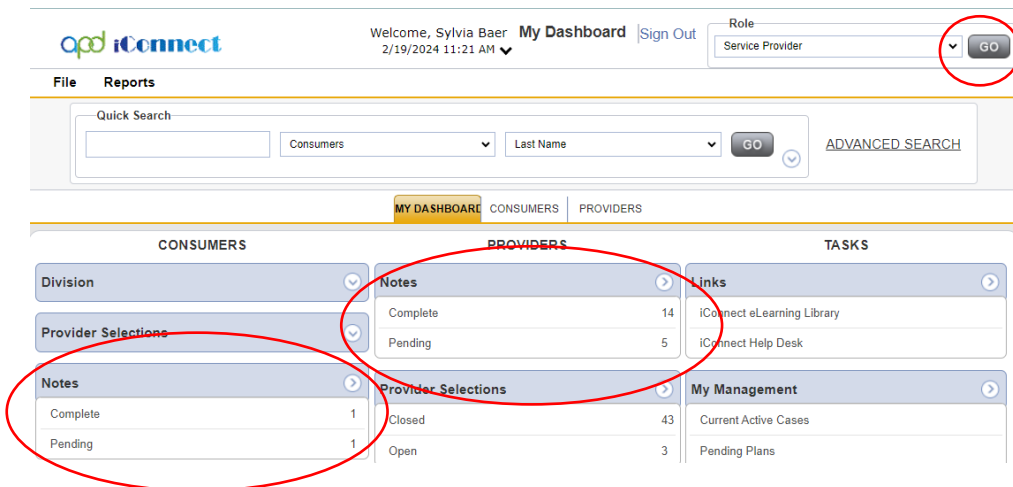
ii. From the list grid view, you can check mark all or a few of the Notes from the right-hand side. Then navigate to **Tools** > **Mark as Read.**
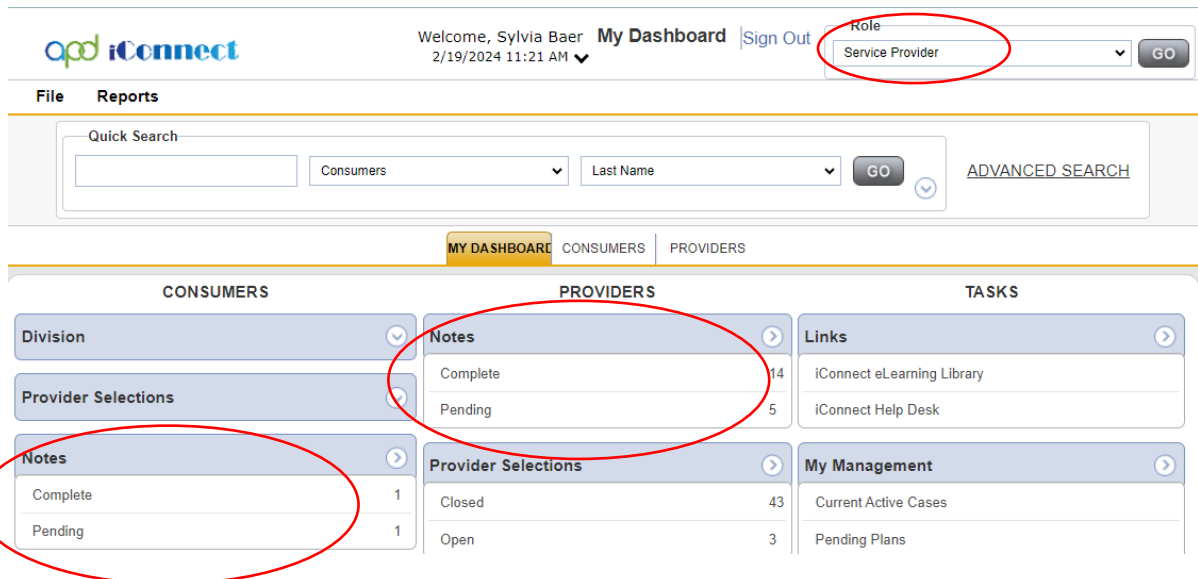

b. Notes can also be marked as read from the opened Note.

i. Once logged into iConnect, select your appropriate Role and press **Go**. On your My Dashboard, you will click the Notes you want to view (Providers/Consumers and Pending or Complete).
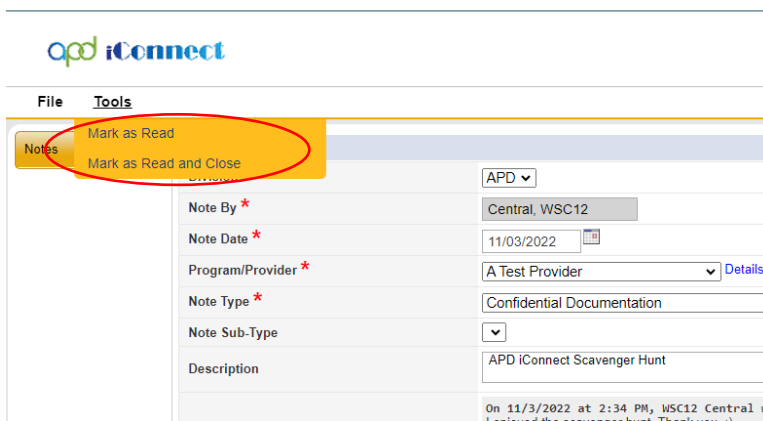
ii.   Select the Note you want to view.

iii. Then navigate to **Tools** > **Mark as Read or Mark as Read and Close.**
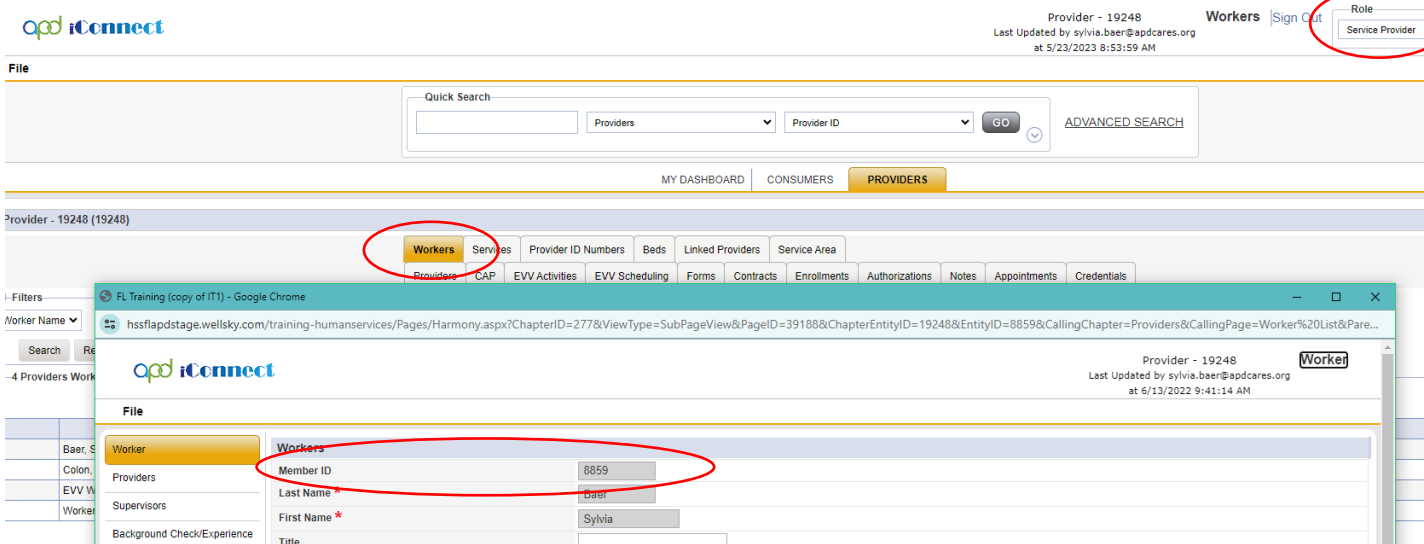
2. Ensure the correct Note Recipient.

   a. If you see that there are two individuals with the same name when searching for the worker as a Note Recipient, reach out to the individual and inquire into the Member ID.

688	Smith, Jessica
5135	Smith, Jessica

   b. To find your Member ID, the Service Provider (Owner) can go to their **Provider Record** > **Workers** and <u>select the Worker's name</u>. The screen will show their Member ID for their agency. (Workers will have a different Member ID for each Agency they work for.)

c. *PRO TIP: The Service Provider (Owner) can edit the title for their employee in order to ensure that the worker can be easily identified as an employee for their organization.*
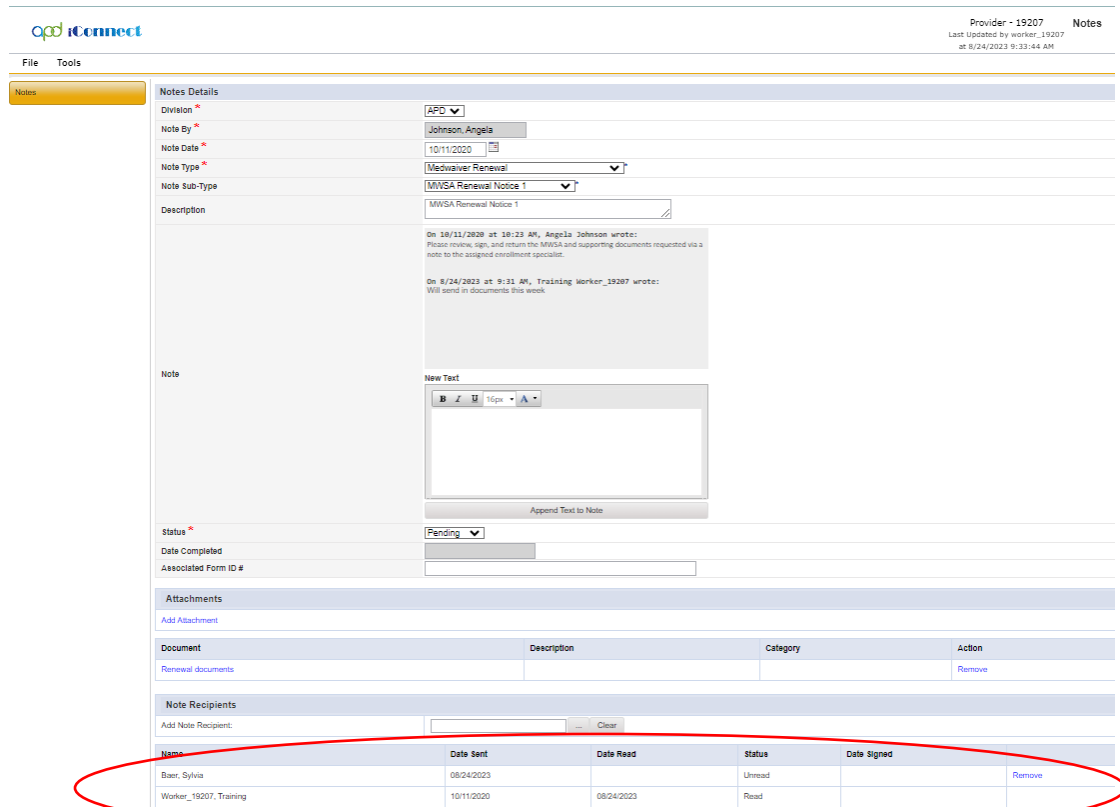
3. Verify if a Note Recipient has "Read" the Note to determine if they need to be added again.

   a. Navigate to the Note you want to verify. Then scroll down to see the Note Recipients.

Note Recipients						
Add Note Recipient:		[ ]	...	Clear		
Name	**Date Sent**	**Date Read**	**Status**	**Date Signed**	
Baer, Sylvia	08/24/2023		Unread		Remove
Worker_19207, Training	10/11/2020	08/24/2023	Read		

b. If the Note is marked Unread, that means the Note is still on the recipient's My Dashboard. If the Note is marked Read, that means the Note is no longer on the recipient's My Dashboard. User will be able to resend the Note to that user if needed.
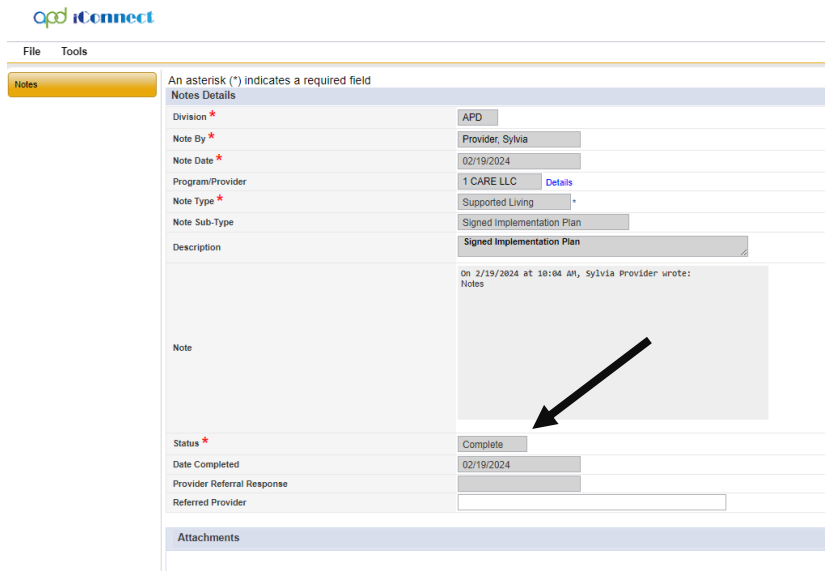
    i. **Unread** – The Note is on the recipient's My Dashboard.

    ii. **Read –** The Note is no longer on the recipient's My Dashboard.

Troubleshooting

There are times when things do not go as planned. This section will help you to determine why there might be issues with the Notes in iConnect.

1. Not getting a response to the Note I sent, or I was told I was added to a Note and I don't see it.

a. Incorrect Recipient- Check the name of the recipients and determine if the name was incorrect or if they have a different Member ID number. Reference Best Practices with Notes in iConnect Number 2.

b. Verify that the correct Note Type and Note Sub-Type was used in the workflow. (Not all providers have access to the same Note Types and Note Sub-Types.)

c. Verify the Note was done on the proper Record. For example: If a Provider sent a Note to a WSC from the Provider Record, the WSC would not have access to that Note, since it is not part of the Consumer Record.

2. I am unable to respond to a Note or I was informed that a recipient was not able to respond to my Note that I sent.

    a. Check the Status of the Note. Notes in Complete status can no longer be edited. To change the Status of a Complete Note, a ticket request must be done. Not all Notes are allowed to be reversed and a New Note may need to be done.

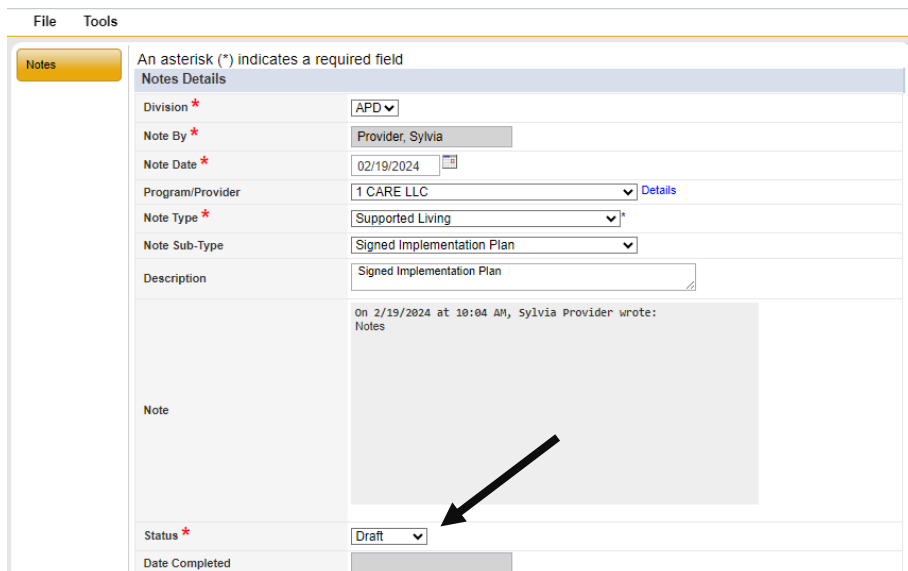   b. If the Note is in Draft Status, only the creator can respond to the Note. The creator will need to follow the appropriate workflow and change the status of the Note.
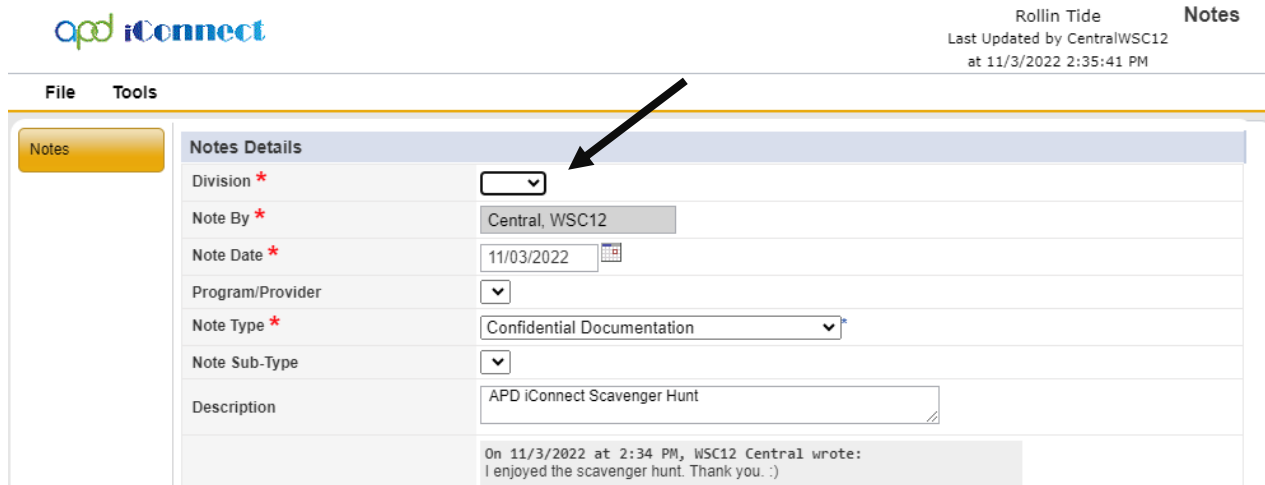
3. I am not able to Save the Note I am creating.

   a. If you are not able to Save due to the Division not populating, contact your Regional iConnect Trainer.
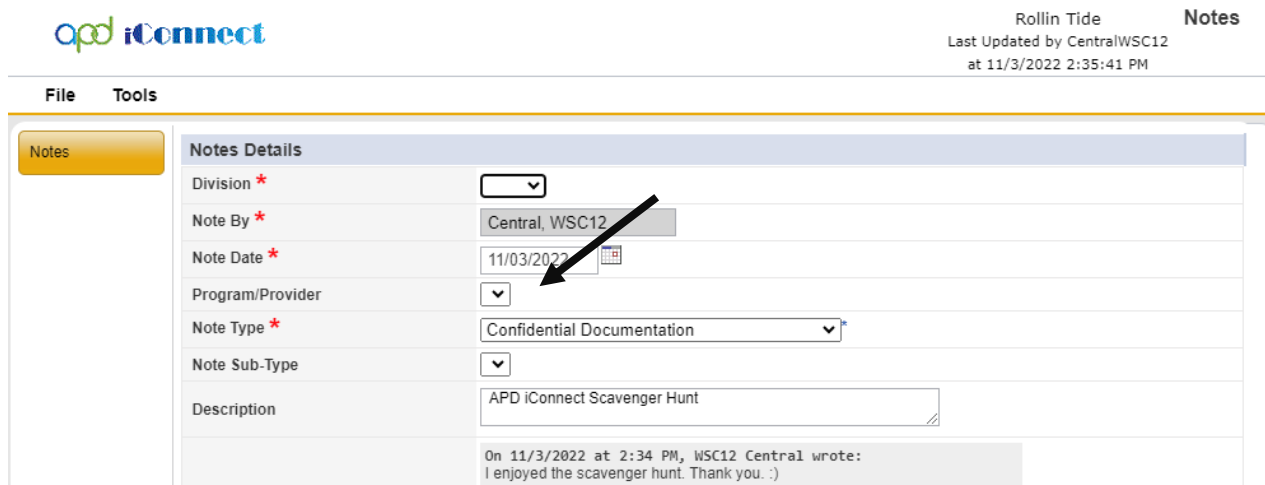
   b. If you are not able to Save due to the Program/Provider not showing your Agency, contact the WSC and asked to be added to the Provider Selection Tab of the Consumer's Record.