Notes in APD iConnect
Training for APD Staff, WSCs, and Service Providers

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Governor
Barbara Palmer
APD Director
Objectives/Table of Contents

After reviewing this PowerPoint you will be able to:

• Define the different Note statuses
  – Slides 3 through 6

• Add a Note in a consumer record
  – Slides 7 through 19

• Reply to notes sent to you
  – Slides 20 through 32

• Mark a Note as read
  – Slides 33 through 36

• Send Notes in a provider record
  – Slides 37 and 38
Note Status

• The Note's purpose determines its status
  — Draft Status: Please do not send or add Draft Notes. Change the status as indicated in the manual or job aid.
  — Complete Status: Used when a Note may be in its final stage.
    — Information in the Note may require the recipient to take further action or no additional may be required. It is important that a Note in Complete Status be reviewed.
Note Status

– Pending Status: Used when a Note documents a conversation between multiple parties on a consumer's record. It allows for tracking until a resolution is made or a process has been completed.
Note Status

– Alert Status: Used when a consumer has experienced a significant life event. A few examples are death, facility placement and waiver disenrollment.

– The Note will pop up on a consumer record every time it’s entered and will continue to pop up until the Note's creator changes the status to Complete.
Note Status

– I’m Interested: Used when a provider is responding to a request to accept a new consumer.
– I’m Not Interested: Used when a provider is declining a request to accept a new consumer.
How to Add a Note

- Your role determines what Note types and Sub-types you can add within APD iConnect.
- Enter the specific consumer record.
- Go to the Notes Tab.
- **File > Add Notes**
How to Add a Note

• In the WSC/CDC and Service Provider roles, you must select your agency name in the **Program/Provider** dropdown.

• The drop-down pulls from your provider selection record.
  – FOR WSCs ONLY: If this field does not populate, you will add yourself as a provider selection. Follow this job aid from our eLearning Library: [Add a WSC Provider Selection](#).
## How to Add a Note

### Notes Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Division *</td>
<td>APD</td>
</tr>
<tr>
<td>Note By *</td>
<td>Worker, Applicable</td>
</tr>
<tr>
<td>Note Date *</td>
<td>11/13/2019</td>
</tr>
<tr>
<td>Program/Provider *</td>
<td>Training Test Provider</td>
</tr>
<tr>
<td>Note Type *</td>
<td></td>
</tr>
<tr>
<td>Note Sub-Type</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
</tbody>
</table>

### Note

- **Status ***: Draft
- **Date Completed**: 

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How to Add a Note

• The Note type and sub-type depend on its purpose.
• The manuals and job aids will ALWAYS state what Note type and sub-type to use.
• Please do not guess.
• Incorrect use of Note type, Sub-type, and Status combinations can trigger unnecessary ticklers.
How to Add a Note

• The Description is like the subject line of an email.
• People can view the Description before opening the Note to understand what is in the Note.
• Description is not required, but it is highly suggested.

<table>
<thead>
<tr>
<th>Note By</th>
<th>Note Type</th>
<th>Note Sub-Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worker, Applicable</td>
<td>Waiver Disenrollment</td>
<td>Pending Waiver Disenrollment</td>
<td>This is like the subject line of an email.</td>
</tr>
</tbody>
</table>
How to Add a Note

- The body of the Note is for the details.
- There is a 6000-character limit.
How to Add a Note

• The default status for Notes is Draft.

• Change to the appropriate status indicated in the manual or job aid.

• If a Note is put in Complete status by mistake, call the APD iConnect Helpdesk to reverse the status of the Note to Pending.
  – The number is 1(800)353-5168
How to Add a Note

• To attach something to a Note, click **Add Attachment**.

• Click **Browse** to search the computer for the document to add.

• Once the document is found, select it and click **Open**.

• Click **Upload**.
How to Add a Note

• The page will reload and show the document attached.

<table>
<thead>
<tr>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Attachment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Document</th>
<th>Description</th>
<th>Category</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>APD Eligible Diagnoses Quick Reference.pdf</td>
<td></td>
<td></td>
<td>Remove</td>
</tr>
</tbody>
</table>

• If the wrong attachment is selected, click **Remove** on the right.
• PDF documents are preferred over Word documents, as PDFs cannot be downloaded and edited.
• Up to 18MBs per attachment can be added to a Note – Multiple 18MB attachments can be added to the same Note.
How to Add a Note

• If someone must view the Note created, add them as a Note recipient.

• Route the new Note record to the appropriate worker by clicking the ellipsis ... button next to Add Note Recipient.

• Search by last name and click the worker you want to add as a recipient.
How to Add a Note

- Once selected, the worker will appear as an **Unread** Note recipient.

- Once saved, unread recipient Notes appear on the recipient’s My Dashboard.

- If the wrong worker is selected, click **Remove** on the right.

- You can add as many recipients as needed.
How to Add a Note

• Sometimes Notes are added without recipients.
• The manual always states when and to whom a Note should be sent.

Always use your resources!
How to Add a Note

• Once completed click **File > Save and Close Notes**
• There is no “Send” button. Once the Note is saved, it will go to the recipient's My Dashboard.
How to Reply to a Note

• Log on to APD iConnect to check your My Dashboard.
• On the left under the **Consumer** section is a section for Notes.
• If you were added as a Note recipient from a consumer record, it will show here.
How to Reply to a Note
How to Reply to a Note

- Click the **Pending** or **Complete** status to access the Notes in the Notes queue.

<table>
<thead>
<tr>
<th>iConnect ID</th>
<th>Consumer</th>
<th>Note Type</th>
<th>Note Sub Type</th>
<th>Note Date</th>
<th>Subject</th>
<th>Author</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>11618</td>
<td>Adamski, Jeffrey</td>
<td>GSI</td>
<td>GSI Status Pending</td>
<td>10/02/2019</td>
<td>I'm working on this</td>
<td>Shortar, Caroline</td>
<td>Complete</td>
</tr>
<tr>
<td>36048</td>
<td>Gabbard, Tony</td>
<td>Crisis</td>
<td>Notice of Crisis Approval</td>
<td>11/05/2019</td>
<td>Sent to consumer on 11/5</td>
<td>Latouche, Lore</td>
<td>Complete</td>
</tr>
<tr>
<td>25910</td>
<td>Nye, Marco</td>
<td>Cost Plan Review</td>
<td>Plan Validation Review</td>
<td>09/10/2019</td>
<td>COST PLAN REVIEW</td>
<td>Lumumba, Kwame</td>
<td>Complete</td>
</tr>
<tr>
<td>39033</td>
<td>Stamm, Gerald</td>
<td>Crisis</td>
<td>Additional Documents</td>
<td>10/31/2019</td>
<td>Consumer needing urgent placement</td>
<td>Robaina, Cristiana</td>
<td>Complete</td>
</tr>
</tbody>
</table>
How to Reply to a Note

• Use the filter to streamline the Notes search.
  – Add a filter by clicking the green +.
  – Remove a filter by clicking the red x.

• Use the drop-down to further streamline your search.
How to Reply to a Note

• Click the blue headers to organize how Notes are viewed.

• Change the number on the bottom of the page to adjust how many Notes can be viewed per page.
  – The maximum number 999.
How to Reply to a Note

- Click to open the individual Note.
How to Reply to a Note

- Type a reply to the Note in the white box and click **Append Text to Note** to send the reply to the gray box with a time stamp.
- If you don't click Append Text to Note, the reply will not be added or seen.
How to Reply to a Note

- Update the status of the note, if appropriate.
How to Reply to a Note

• If the reply must be viewed by another worker, add the worker as a Note recipient:
  – Even if the worker created the original Note.
  – If the worker is already an unread recipient, APD iConncet will display a message.

Message from webpage

Worker, Applicable is already included as an Unread Recipient.
How to Reply to a Note

• Route the new Note to the appropriate worker by clicking the ellipsis ... button next to Add Note Recipient.

• Search by last name and click the worker record to add as a recipient.
How to Reply to a Note

- Once you click their name, they will show as an Unread recipient.

<table>
<thead>
<tr>
<th>Name</th>
<th>Date Sent</th>
<th>Date Read</th>
<th>Status</th>
<th>Date Signed</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worker, Applicable</td>
<td>11/13/2019</td>
<td></td>
<td>Unread</td>
<td></td>
<td>Remove</td>
</tr>
</tbody>
</table>

- If the wrong worker is selected, click **Remove** on the right.

- Add as many recipients as needed.
How to Reply to a Note

• If you are having a back-and-forth conversation, there is a possibility you will have to add the same person every time you reply.

• Unread = On their My Dashboard.
• Read = They marked the note as Read and cleared it from their My Dashboard.
How to Reply to a Note

• Once you are done, you will click **File > Save and Close Notes**.

• There is no Send, but your Note will go to your Note recipient’s My Dashboards once you save.
How to Mark a Note as Read

• There are two ways you can mark a note as Read:

1. From inside the Note
   – Open the Note, read it, and **before** responding, hover over Tools and click Mark as Read.
   – Then respond
How to Mark a Note as Read

2. Mark multiple Notes as read:
   – Reply to multiple Notes and then mark them all read at the same time.
   – This is done from the Notes queue accessed from your My Dashboard.
How to Mark a Note as Read

- Check the box on the right of the Note(s) to indicate that the Note was read.
- Hover over **Tools** and click **Mark as Read**.
How to Mark a Note as Read

• It can be to your benefit to manually mark Notes as Read.
  – Keep notes on your My Dashboard as a reminder to complete a task.
  – Notes remain on your My Dashboard until they are marked as Read.
Add a Note in a Provider Record

• The **only** difference between adding a Note in a consumer record and a provider record is where the Note shows on your My Dashboard.

• When someone sends a Note or replies to a Note from within a provider record, it will show under the provider section of your My Dashboard.
Add a Note in a Provider Record
eLearning Library

- The manual and all job aids, including this PPT, are in the eLearning Library.
- There is a link to the eLearning Library on your My Dashboard, under Tasks.
eLearning Library

<table>
<thead>
<tr>
<th>About Us</th>
<th>Locations</th>
<th>Providers</th>
<th>Customers</th>
<th>Waivers</th>
<th>News</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Important Links</strong></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>◦ APD iConnect</td>
<td>◦ APD iConnect</td>
<td>◦ APD iConnect FAQ</td>
<td>◦ APD iConnect eLearning Library</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**APD iConnect eLearning Library**

*Note: Disconnect from VPN before proceeding with the modules below. VPN connection is not required for this part.*

**eLearning Modules**

- APD iConnect Basics
- Overview of the Consumer Central Record
- WSC Interaction with Person-Centered Support Plan

**Documents**

- APD iConnect Case Management Training Manual (Posted 12/4/18)
- APD iConnect Status Definitions Per Tab Instruction Sheet
- Add a WSC Provider Selection
- Add a Supervisor WSC
- APD iConnect Quick Reference Guide
- Adding Medical and Mental Health Diagnoses

Be sure to check out the APD Blog by clicking below!
Questions?

Contact your Regional Worker or Trainer, or email iConnect@apdcares.org.