

Notes in APD iConnect

Training for APD Staff, WSCs, and Service
Providers



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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**

The screenshot displays the APD iConnect user interface. At the top, there is a navigation menu with 'File', 'Tools', 'Reports', 'Ticklers', and 'View Consumer Incidents'. Below this, a yellow 'Add Notes' button is visible, along with a 'Print' option. A search area includes a 'Quick Search' field, a dropdown menu set to 'Consumers', a 'Last Name' input field, a 'GO' button, and a 'Participating' checkbox. A date stamp '01/10/2019 1:29:43 PM' is in the top right corner.

The main content area shows a breadcrumb trail: 'MY DASHBOARD' > 'CONSUMERS' > 'INCIDENTS' > 'CLAIMS' > 'SCHEDULER'. Below this, the consumer record for 'Hershey, Jill (23551)' is displayed. A horizontal menu of tabs includes 'Diagnosis', 'Eligibility', 'Medications', 'Auths', 'Provider Documentation', 'Contacts', 'Consumer Module User', 'Demographics', 'Divisions', 'Consumer Budgets', 'Programs', 'Provider Selections', 'SAN', 'Notes' (highlighted in yellow), 'Forms', 'Appointments', 'Plans', 'Waiting List', and 'Payers'.


A 'Filters' section on the left shows 'Note Date' with a dropdown arrow and a '+' sign, and 'Search' and 'Reset' buttons. Below the filters, it states '17 Notes record(s) returned - now viewing 1 through 15'.

Note Date	Note By	Note Type	Note Sub-Type	Description
09/17/2019	Worker, Applicable	Application/Eligibility	Application Acknowledgement Letter	
09/17/2019	Worker, Applicable	Application/Eligibility	Application Acknowledgement Letter	
09/17/2019	Worker, Applicable	Application/Eligibility	Application Acknowledgement Letter	

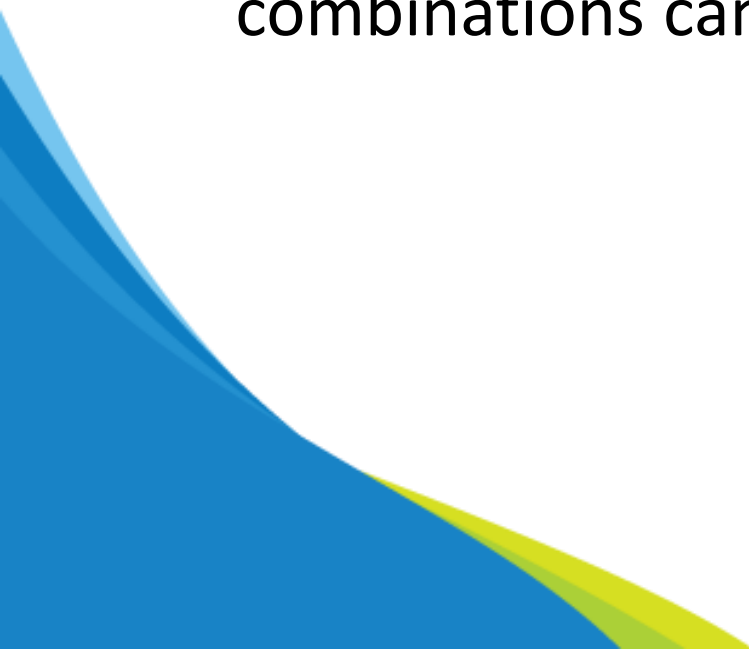
How to Add a Note

- 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	
Division *	APD ▾
Note By *	Worker, Applicable ▾
Note Date *	11/13/2019 
Program/Provider *	Training Test Provider ▾ Details
Note Type *	▾*
Note Sub-Type	▾
Description	<input type="text"/>
Note	<div style="border: 1px solid #ccc; height: 150px; width: 100%;"></div>
Status *	Draft ▾
Date Completed	<input type="text"/>

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.

Note By	Note Type	Note Sub-Type	Description
Worker, Applicable	Waiver Disenrollment	Pending Waiver Disenrollment	This is like the subject line of an email.

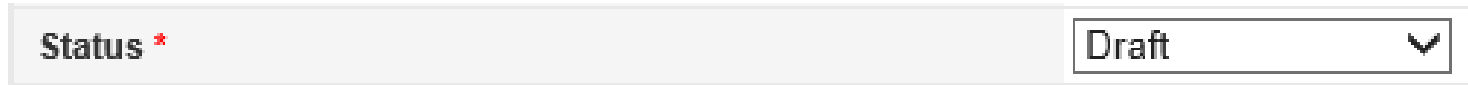
How to Add a Note

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

Description	This is like the Subject Line of an email
Note	This is where your details go.

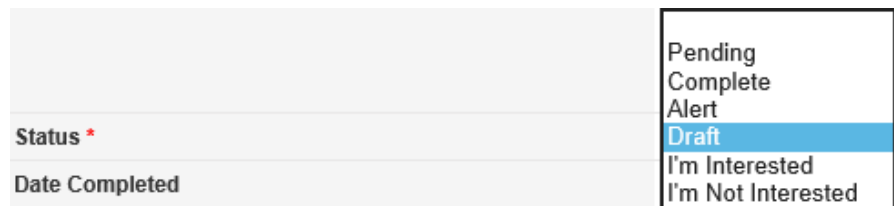
How to Add a Note

- The default status for Notes is Draft.



A screenshot of a form field labeled "Status *". To the right of the label is a dropdown menu with a downward-pointing arrow. The dropdown menu is open, showing a list of options: "Pending", "Complete", "Alert", "Draft", "I'm Interested", and "I'm Not Interested". The "Draft" option is highlighted in blue.

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



A screenshot of a form field labeled "Status *". To the right of the label is a dropdown menu with a downward-pointing arrow. The dropdown menu is open, showing a list of options: "Pending", "Complete", "Alert", "Draft", "I'm Interested", and "I'm Not Interested". The "Draft" option is highlighted in blue.

- 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.

Attachments			
Add Attachment			
Document	Description	Category	Action
APD Eligible Diagnoses Quick Reference.pdf			Remove

- 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.

Note Recipients

Add Note Recipient:

- Search by last name and click the worker you want to add as a recipient.

Search by: Search Text:

MEMBERID	Worker	Title
2860	Worker, ABA	
2858	Worker, Applicable	
2861	Worker, MCM	
2863	Worker, Provider	
2862	Worker, QSI	
2886	Worker, State Office	
3006	Worker, Training	
2859	Worker, WSC	

How to Add a Note

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

Note Recipients					
Add Note Recipient:		<input type="text"/>	<input type="button" value="Clear"/>		
Name	Date Sent	Date Read	Status	Date Signed	
Worker, Applicable	11/13/2019		Unread		Remove

- 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

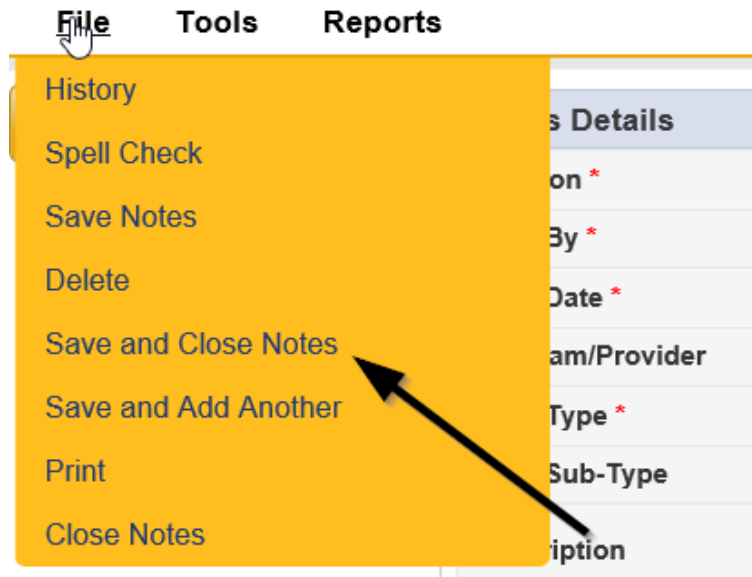
- Sometimes Notes are added without recipients.
- The manual always states when and to whom a Note should be sent.

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

File

Quick Search

Consumers Last Name [ADVANCED SEARCH](#)

Participating

MY DASHBOARD

CONSUMERS

PROVIDERS

INCIDENTS

CLAIMS

SCHEDULER

CONSUMERS

Division	>
APD Eligible - Waiver	275
APD Eligible - WLSC Assigned	3
Closed	2
Provider Selections	▼
Notes	>
Complete	2
Pending	1

INCIDENTS

My Incident Ticklers	>
Ticklers	5
Inquiry Alert Notes List	>
Unread Alert Notes	0

PROVIDERS

Notes	>
Complete	8
Pending	2

TASKS

Links	>
iConnect eLearning Library	
iConnect Help Desk	
My Management	>
Current Active Cases	
Pending Plans	
Ticklers Due	
My Claims	>

How to Reply to a Note

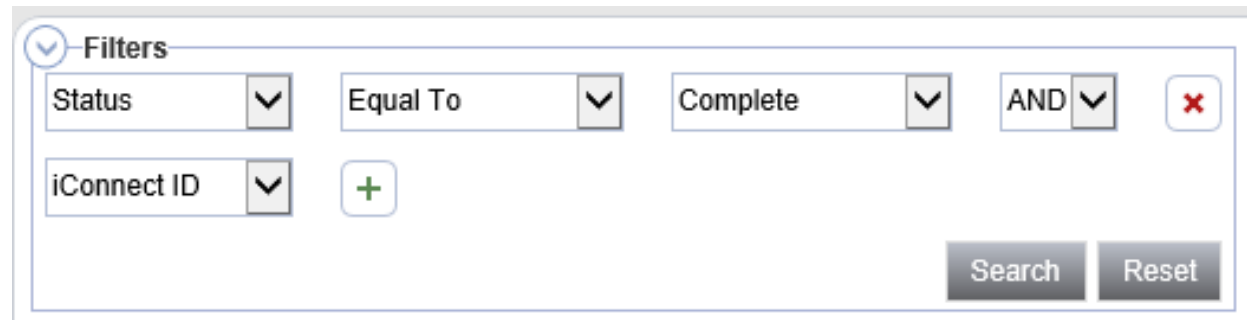
- Click the **Pending** or **Complete** status to access the Notes in the Notes queue.

— 4 Notes record(s) returned - now viewing 1 through 4 —

iConnect ID	Consumer ▲	Note Type	Note Sub Type	Note Date	Subject	Author	Status	<input type="checkbox"/>
11618	Adamski, Jeffrey	QSI	QSI Status Pending	10/02/2019	I'm working on this	Shorter, Caroline	Complete	<input type="checkbox"/>
36048	Gabbard, Tony	Crisis	Notice of Crisis Approval	11/05/2019	Sent to consumer on 11/5	Latouche, Lorie	Complete	<input type="checkbox"/>
25910	Nye, Marco	Cost Plan Review	Plan Validation Review	09/18/2019	COST PLAN REVIEW	Lumumba, Kwame	Complete	<input type="checkbox"/>
39683	Stamm, Gerald	Crisis	Additional Documents	10/31/2019	Consumer needing urgent placement	Robaina, Cristiana	Complete	<input type="checkbox"/>

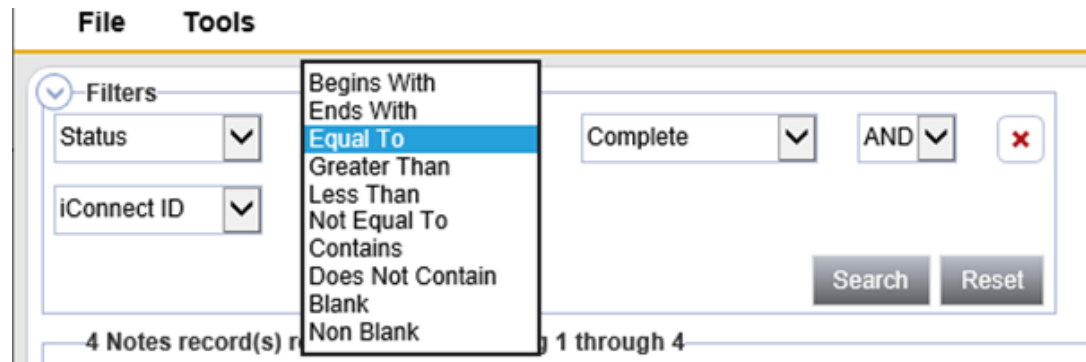
How to Reply to a Note

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



The screenshot shows a search filter interface. At the top, there is a 'Filters' section with a dropdown arrow. Below it, there are two filter rows. The first row contains 'Status' with a dropdown arrow, 'Equal To' with a dropdown arrow, 'Complete' with a dropdown arrow, 'AND' with a dropdown arrow, and a red 'X' button. The second row contains 'iConnect ID' with a dropdown arrow and a green '+' button. At the bottom right, there are 'Search' and 'Reset' buttons.

- Use the drop-down to further streamline your search.



The screenshot shows a search filter interface with a dropdown menu open. The dropdown menu lists the following options: 'Begins With', 'Ends With', 'Equal To', 'Greater Than', 'Less Than', 'Not Equal To', 'Contains', 'Does Not Contain', 'Blank', and 'Non Blank'. The 'Equal To' option is highlighted. The interface also shows 'Status' and 'iConnect ID' filters, a 'Complete' filter, and an 'AND' operator. At the bottom, it displays '4 Notes record(s)' and '1 through 4'. There are 'Search' and 'Reset' buttons.

How to Reply to a Note

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

iConnect ID	Consumer ▲	Note Type	Note Sub Type	Note Date	Subject	Author	Status	<input type="checkbox"/>
4444	1234567	001	001010000	10/08/2010	1234567	1234567	001	<input type="checkbox"/>

- Change the number on the bottom of the page to adjust how many Notes can be viewed per page.
 - The maximum number 999.

View | Plan Validation Review | 09/18/2019 | COST PLAN REVIEW

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


How to Reply to a Note

- Click to open the individual Note.

Notes Details

Division *	APD ▾
Note By *	Worker, WSC
Note Date *	08/23/2019 <input type="text"/>
Program/Provider	APD Waiver ▾ Details
Note Type *	EZ iBudget ▾
Note Sub-Type	WSC Request ▾
Description	Due to change of living setting ▾
Note	<p>On 8/23/2019 at 3:03 PM, Rebecca Stanton wrote: Please send me a new EZ iBudget Calculator. Consumer moved form Family Home to Behavior Focused Group Home.</p> <p>New Text</p> <p><input type="text"/></p> <p>Append Text to Note</p>
Status *	Pending ▾

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

On 1/3/2020 at 12:01 PM, Rebecca Stanton wrote: Please send an updated EZ. The consumer moved from a Family home to a small behavior focused Group Home. QSI is up to date.

New Text

Done

Append Text to Note

Pending

On 1/3/2020 at 12:01 PM, Rebecca Stanton wrote: Please send an updated EZ. The consumer moved from a Family home to a small behavior focused Group Home. QSI is up to date.

On 1/3/2020 at 12:03 PM, Rebecca Stanton wrote: Done

New Text

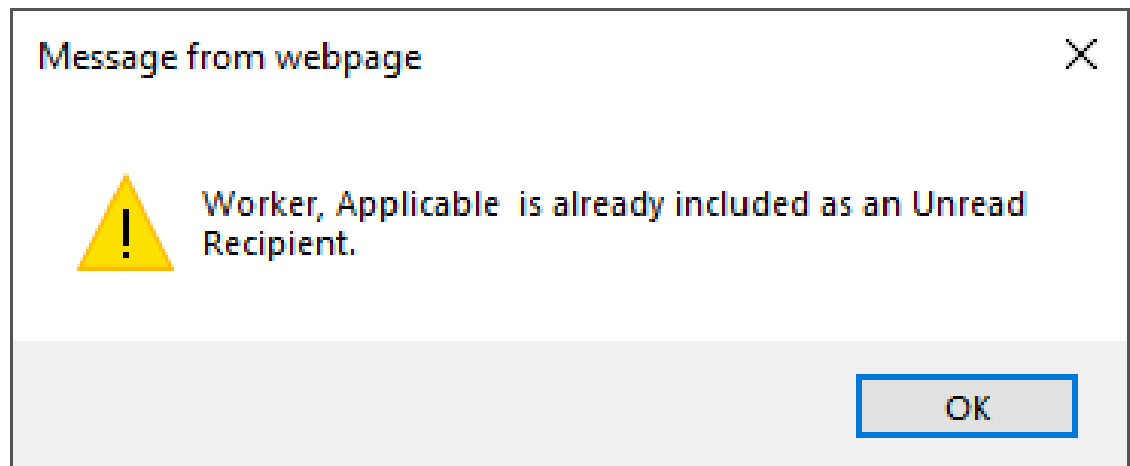
Append Text to Note

Pending

- 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 iConnect will display a message.



How to Reply to a Note

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

Note Recipients

Add Note Recipient:

- Search by last name and click the worker record to add as a recipient.

Search by: Search Text:

MEMBERID	Worker	Title
2860	Worker, ABA	
2858	Worker, Applicable	
2861	Worker, MCM	
2863	Worker, Provider	
2862	Worker, QSI	
2886	Worker, State Office	
3006	Worker, Training	
2859	Worker, WSC	

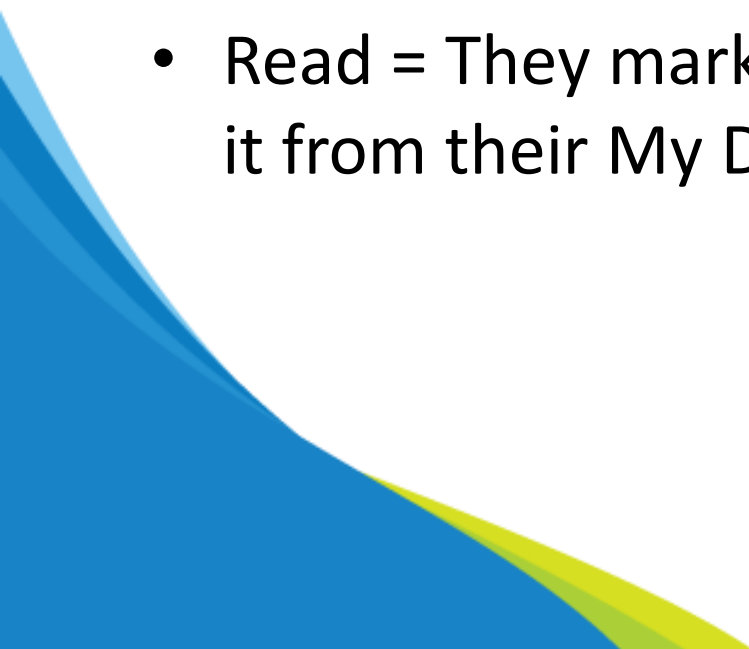
How to Reply to a Note

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

Note Recipients					
Add Note Recipient:		<input type="text"/>	<input type="button" value="Clear"/>		
Name	Date Sent	Date Read	Status	Date Signed	
Worker, Applicable	11/13/2019		Unread		Remove

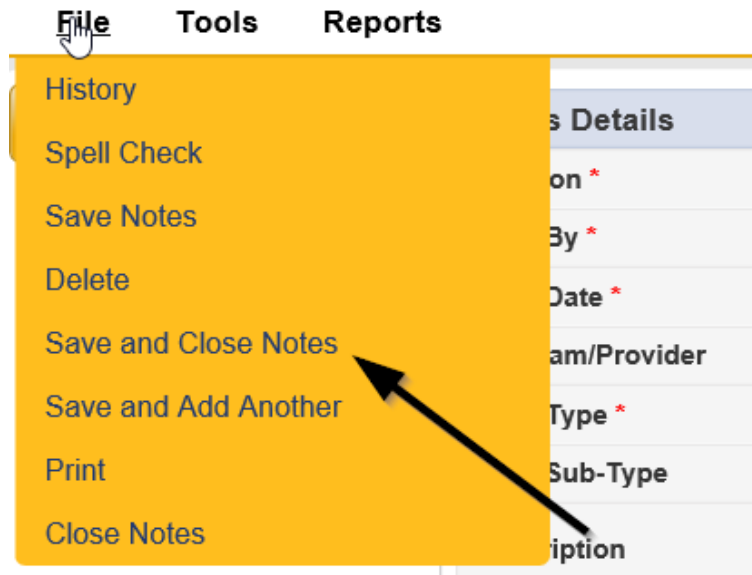
- If the wrong worker is selected, click **Remove** on the right.
- Add as many recipients as needed.

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.

CONSUMERS	
Division >	
APD Eligible - Waiver	275
APD Eligible - WLSC Assigned	3
Closed	2
Provider Selections v	
Notes >	
Complete	2
Pending	1

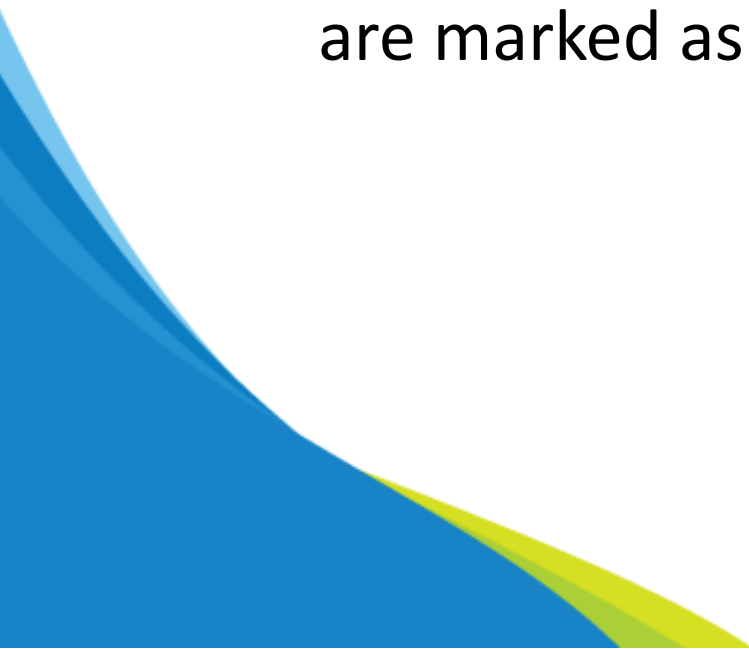
How to Mark a Note as Read

- 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**.


The screenshot shows a web application interface with a menu bar containing 'File' and 'Tools'. A dropdown menu is open under 'Tools', with 'Mark as Read' highlighted in yellow. Below the menu is a search filter box with the following fields: 'Filter' (set to 'Mark as Read'), 'Status' (dropdown), 'Equal To' (dropdown), 'Pending' (dropdown), 'AND' (dropdown), and a red 'X' button. There is also an 'iConnect ID' dropdown and a '+' button. 'Search' and 'Reset' buttons are at the bottom of the filter box. Below the filter, it says '16 Notes record(s) returned - now viewing 1 through 15'. A table with 8 columns is displayed: 'iConnect ID', 'Consumer', 'Note Type', 'Note Sub Type', 'Note Date', 'Subject', 'Author', and 'Status'. The 'Status' column has a checkbox for each row.

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status	<input type="checkbox"/>
26907	Beall, Brett	EZ iBudget	WSC Request	10/31/2019	Changing Living Settings	Germain, Creg	Pending	<input checked="" type="checkbox"/>
17186	Duval, Marc	EZ iBudget	WSC Request	10/31/2019	change of living setting	Despsati, Suzanne	Pending	<input checked="" type="checkbox"/>
24285	Hiatt, Lawrence	EZ iBudget	WSC Request	10/31/2019	Change in living setting request	Mullenix, Darla	Pending	<input checked="" type="checkbox"/>
17490	Hileman, Ricardo	EZ iBudget	WSC Request	10/31/2019	Change in Living Setting Request	McDonald, Timothy	Pending	<input checked="" type="checkbox"/>
10583	Jobe, Jill	WSC Selection	Notification of WSC Change	11/08/2019		St. Victor, Wilson	Pending	<input checked="" type="checkbox"/>
10583	Jobe, Jill	Waiver Disenrollment	Pending Waiver Disenrollment	11/13/2019	This is like the subject line of an email.	Worker, Applicable	Pending	<input type="checkbox"/>
32313	Kell, Andres	SAN	Additional Information Request by State	08/06/2019		Worker, State Office	Pending	<input checked="" type="checkbox"/>
32313	Kell, Andres	EZ iBudget	WSC Request	09/13/2019	Please reply	Stanton, Rebecca	Pending	<input type="checkbox"/>
25498	Oaks, Kelsey	EZ iBudget	WSC Request	10/31/2019	change in living setting	Stanton, Rebecca	Pending	<input type="checkbox"/>
39683	Stamm, Gerald	EZ iBudget	WSC Request	10/31/2019	New living setting needed	Robaina, Cristiana	Pending	<input checked="" type="checkbox"/>
29008	Swinson, Andre	EZ iBudget	WSC Request	10/31/2019	change in living set	Sanon, Pierre	Pending	<input type="checkbox"/>

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 tasks.
 - 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

File

Quick Search

Consumers Last Name [ADVANCED SEARCH](#)

Participating

MY DASHBOARD

CONSUMERS

PROVIDERS

INCIDENTS

CLAIMS

SCHEDULER

CONSUMERS

Division	
APD Eligible - Waiver	275
APD Eligible - WLSC Assigned	3
Closed	2

Provider Selections

Notes

Complete	2
Pending	1

INCIDENTS

My Incident Ticklers	
Ticklers	5

Inquiry Alert Notes List

Unread Alert Notes	0
--------------------	---

PROVIDERS

Notes	
Complete	8
Pending	2

TASKS

Links	
iConnect eLearning Library	
iConnect Help Desk	

My Management

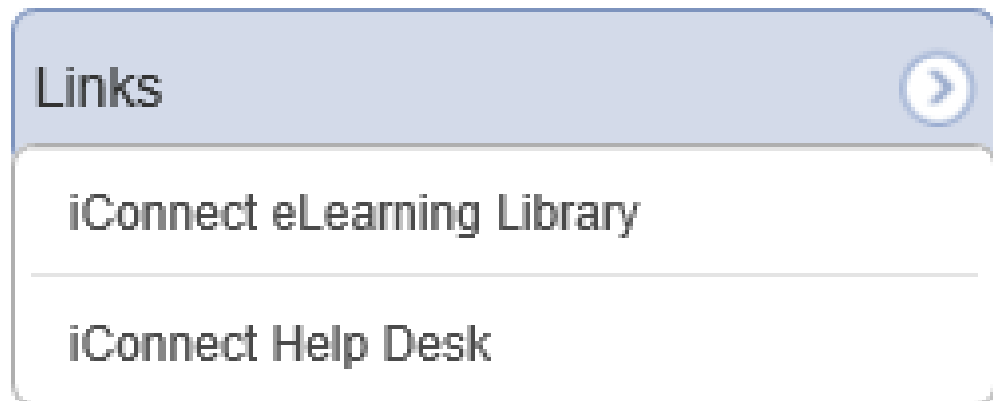
Current Active Cases	
Pending Plans	
Ticklers Due	

My Claims

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.

TASKS



The screenshot shows a 'TASKS' widget with a light blue header. The header contains the word 'Links' on the left and a circular arrow icon on the right. Below the header, there is a list of two items: 'iConnect eLearning Library' and 'iConnect Help Desk', separated by a horizontal line.

eLearning Library

[About Us](#)

[Locations](#)

[Providers](#)

[Customers](#)

[Waivers](#)

[News](#)

Important Links

- [APD iConnect](#)
- [APD iConnect Centrifly](#)
- [APD iConnect FAQ](#)
- [APD iConnect eLearning Library](#)

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



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](#)

Questions?

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





agency for persons with disabilities
State of Florida