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:

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

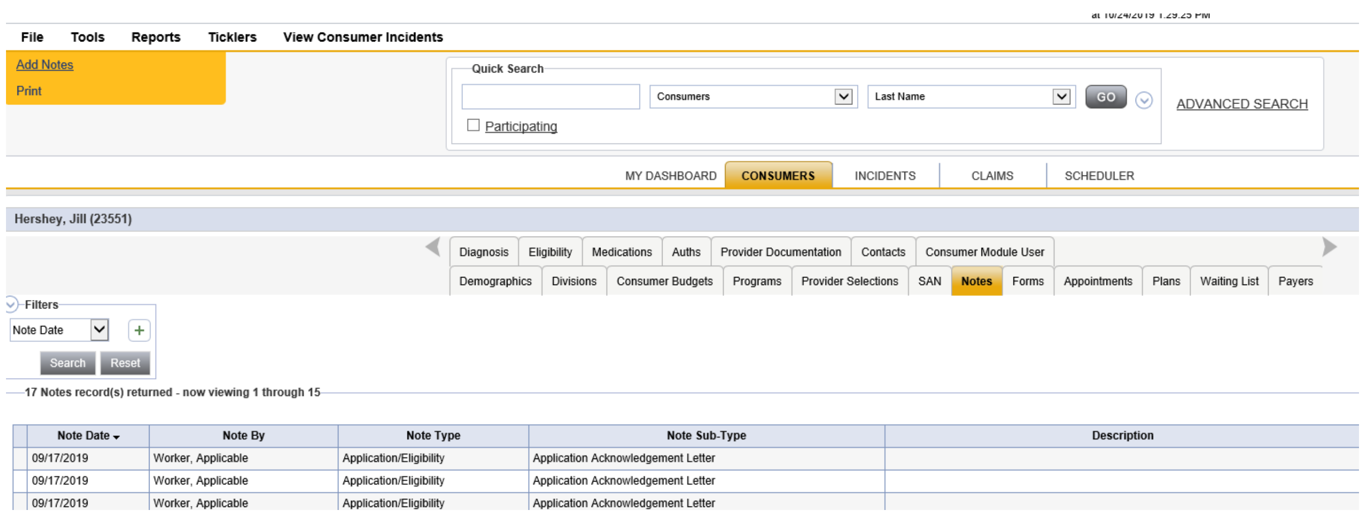
- Alert Status: Used when a consumer has experienced a **significant life event**. A few examples are death, facility placement and waiver disenrollment.
- The Note will pop up on a consumer record every time it’s entered and will continue to pop up until the Note's creator changes the status to Complete.

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	
Division *	APD
Note By *	Worker, Applicable
Note Date *	11/13/2019
Program/Provider *	Training Test Provider Details
Note Type *	*
Note Sub-Type	
Description	
Note	
Status *	Draft
Date Completed	

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.

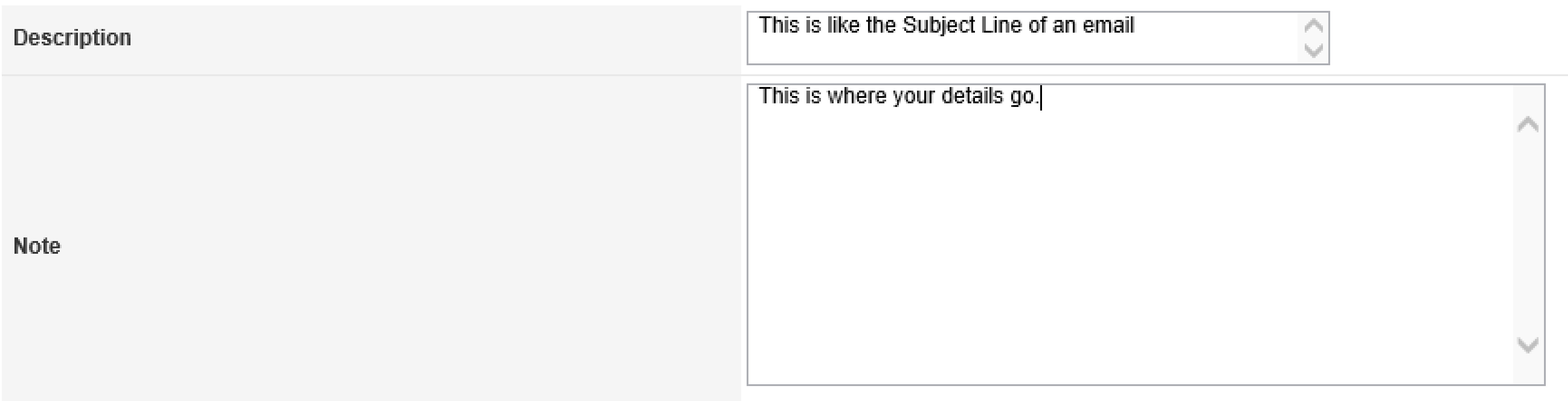
How to Add a Note

- 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.

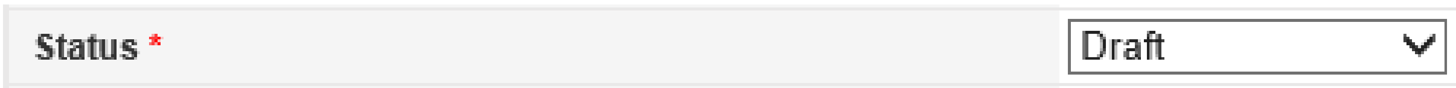
How to Add a Note

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



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.

Attachments			
Add Attachment			

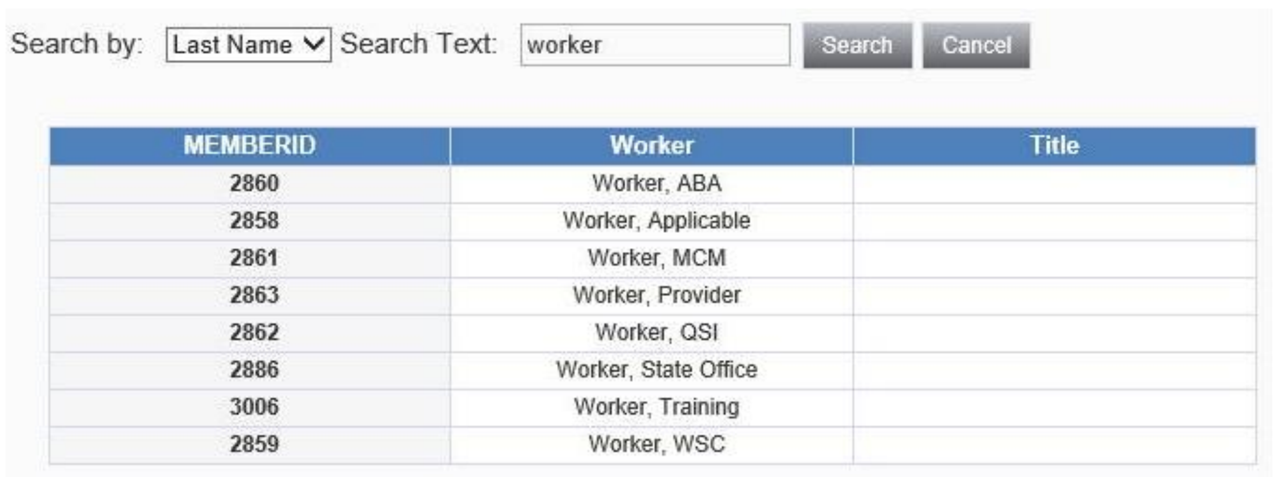
Document	Description	Category	Action
APD Eligible Diagnoses Quick Reference.pdf			Remove

- 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.

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



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: ... 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.

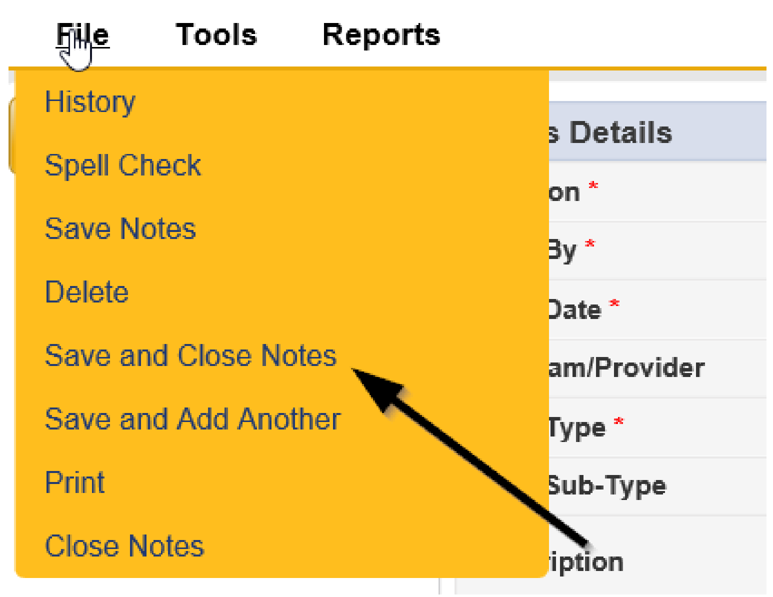
How to Add a Note

- 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

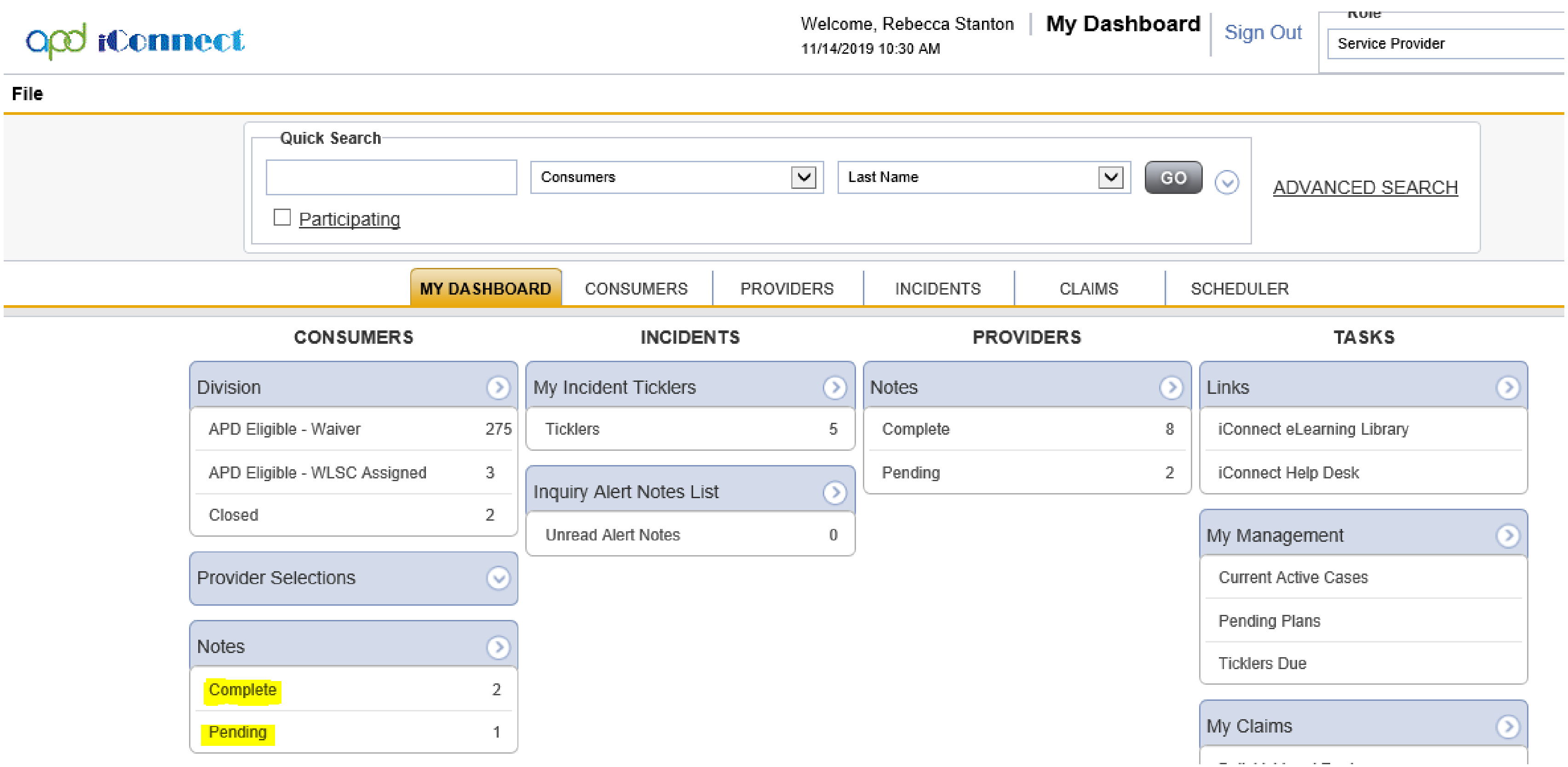
- Once completed click **File** > **Save and Close Notes**
- There is no “Send” button. Once the Note is saved, it will go to the recipient's My Dashboard.



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



How to Reply to a Note

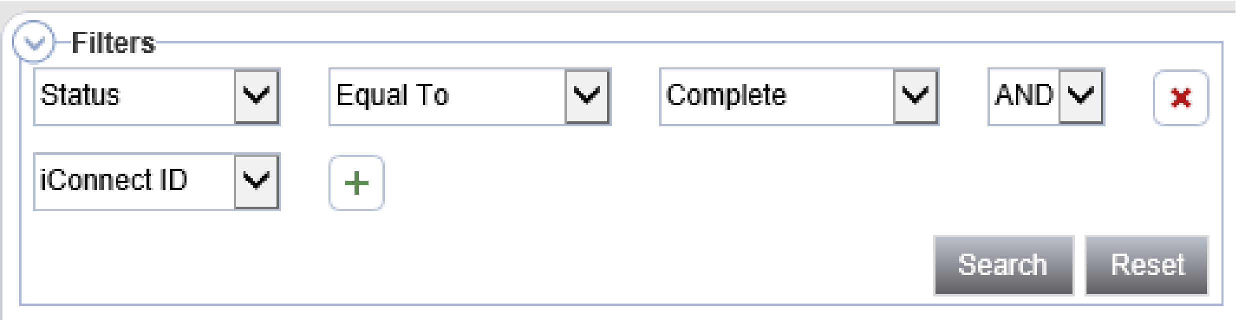
- Click the **Pending** or **Complete** status to access the Notes in the Notes queue.

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

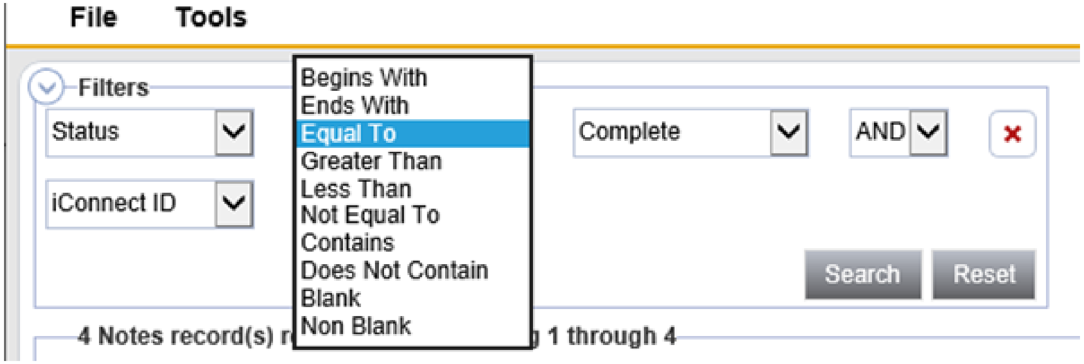
iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status	☐
11618	Adamski, Jeffrey	QSI	QSI Status Pending	10/02/2019	I'm working on this	Shorter, Caroline	Complete	☐
36048	Gabbard, Tony	Crisis	Notice of Crisis Approval	11/05/2019	Sent to consumer on 11/5	Latouche, Lorie	Complete	☐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

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**.



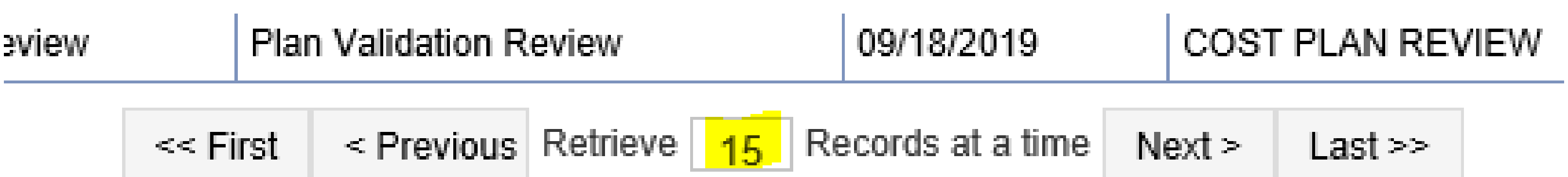
- Use the drop-down to further streamline your search.



How to Reply to a Note

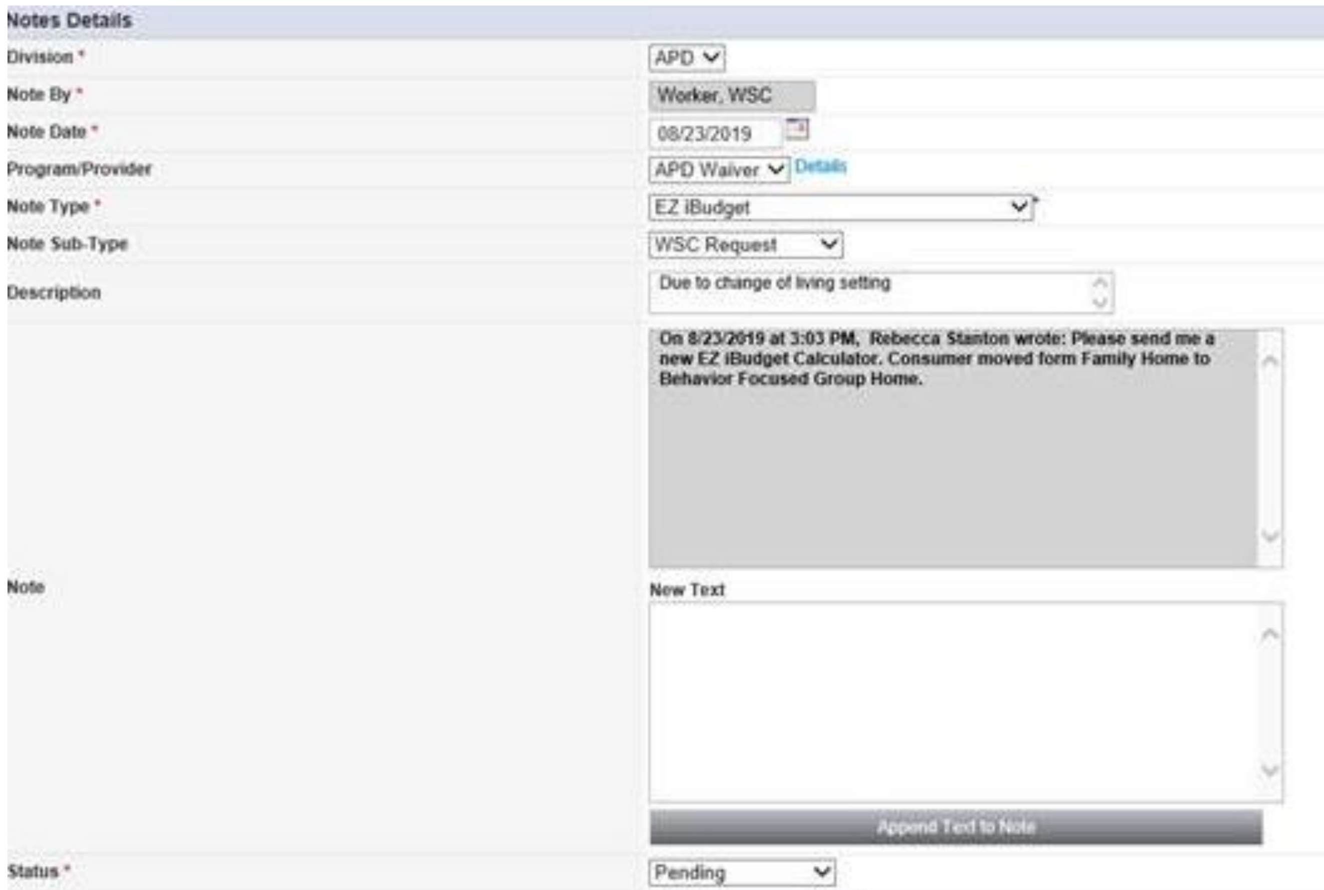
- Click the blue headers to organize how Notes are viewed.

- 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.



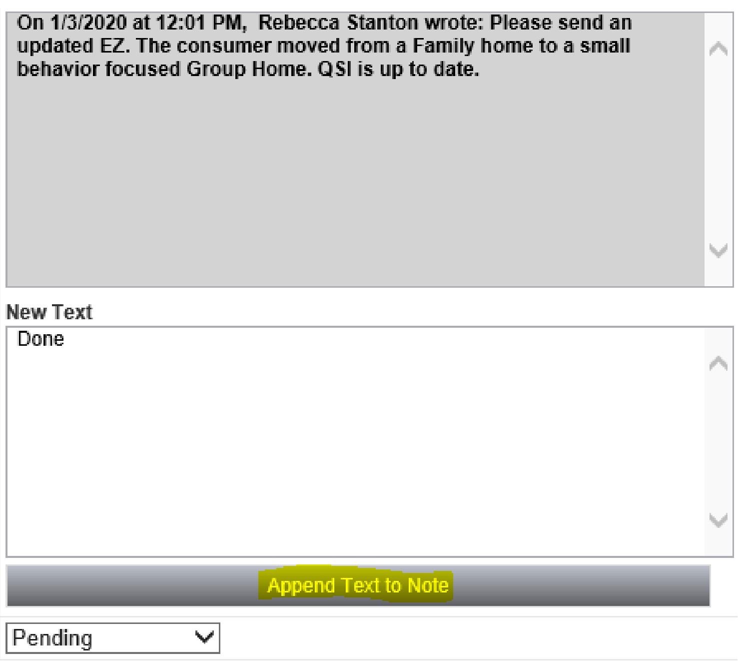
Notes Details

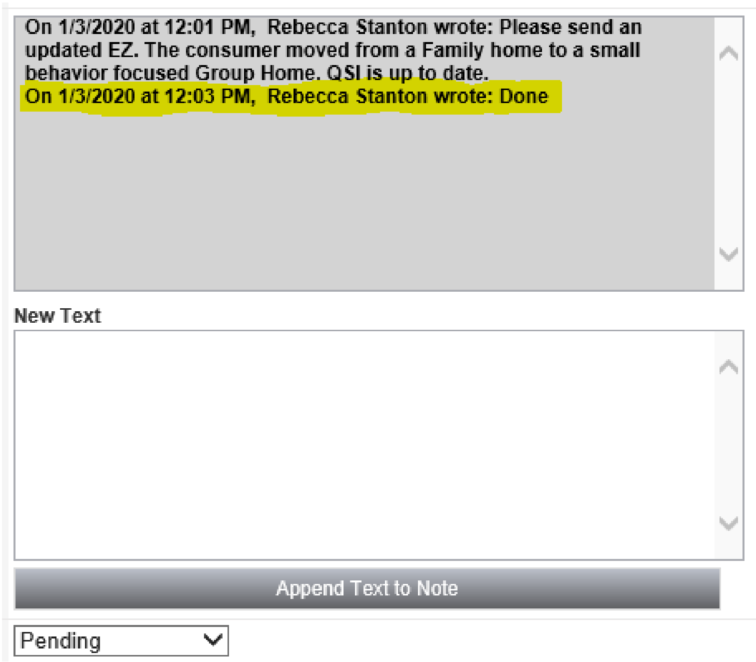
Division *	APD
Note By *	Worker, WSC
Note Date *	08/23/2019
Program/Provider	APD Waiver Details
Note Type *	EZ iBudget
Note Sub-Type	WSC Request
Description	Due to change of living setting
Note	On 8/23/2019 at 3:03 PM, Rebecca Stanton wrote: Please send me a new EZ iBudget Calculator. Consumer moved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

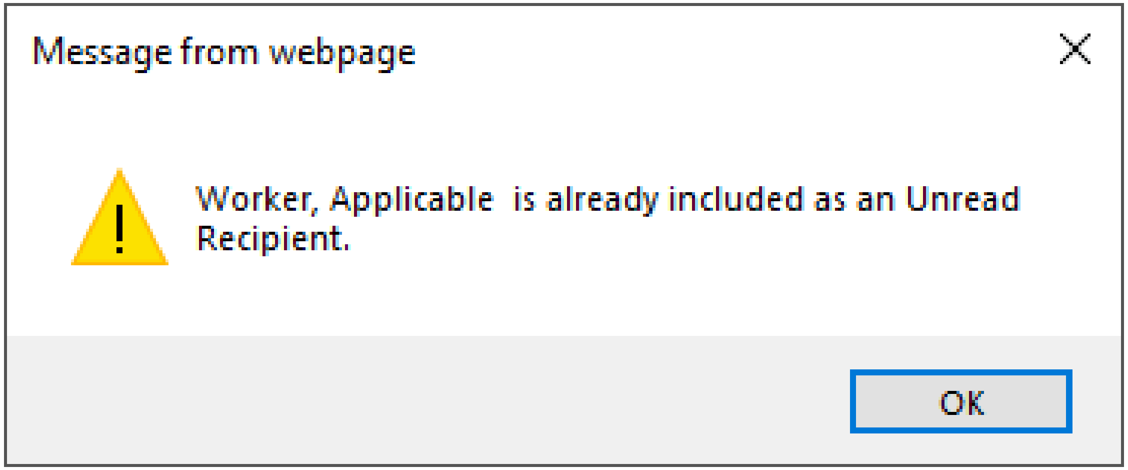




- Update the status of the note, if appropriate.

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: ... Clear

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

Search by: Last Name Search Text: worker Search Cancel

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:	... 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.

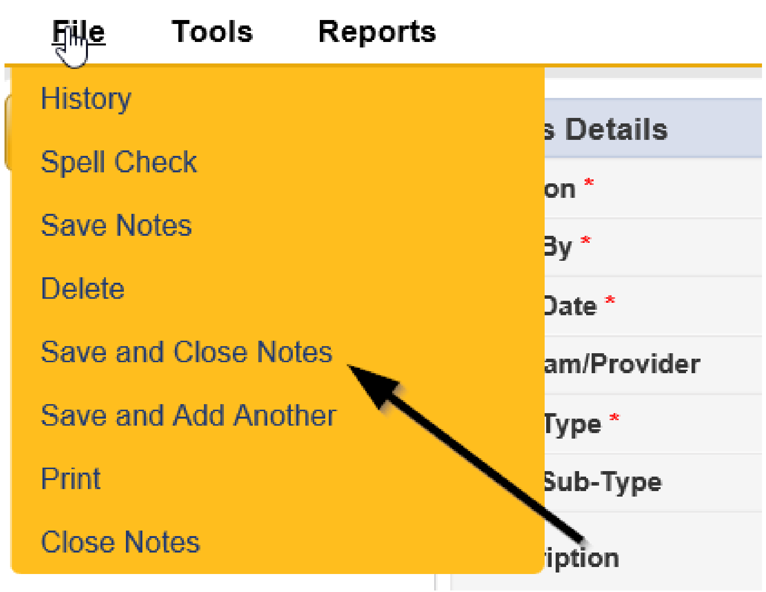
How to Reply to a Note

- 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

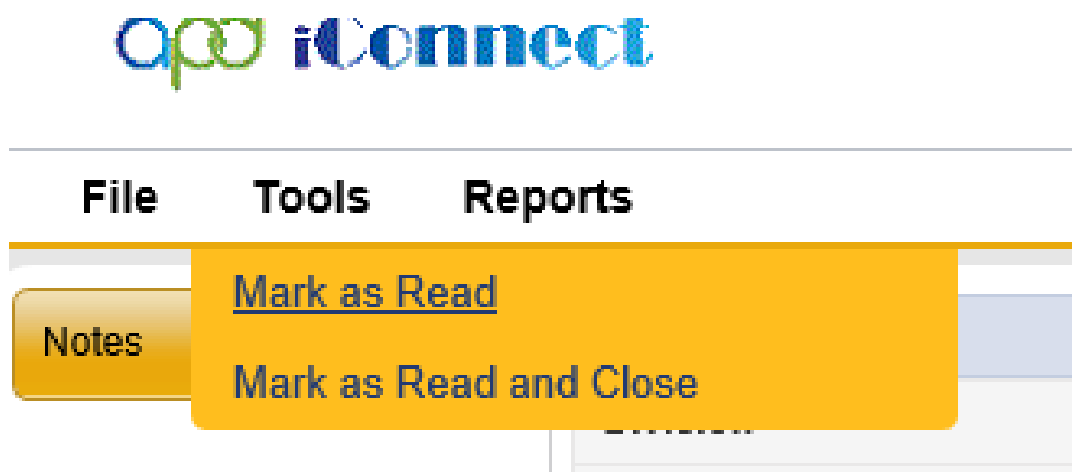
- Once you are done, you will click **File** > **Save and Close Notes**.
- There is no Send, but your Note will go to your Note recipient's My Dashboards once you save.



How to Mark a Note as Read

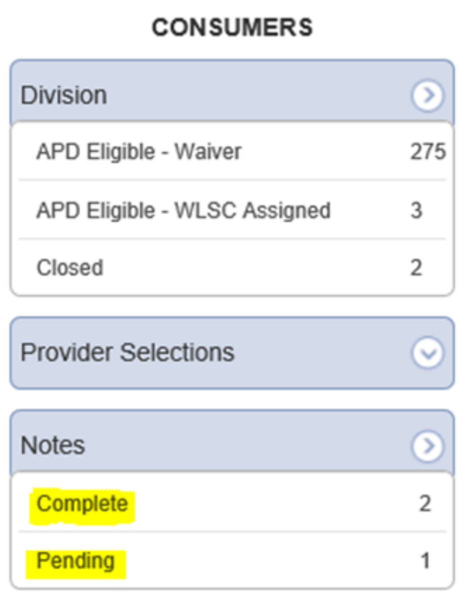
- There are two ways you can mark a note as Read:

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



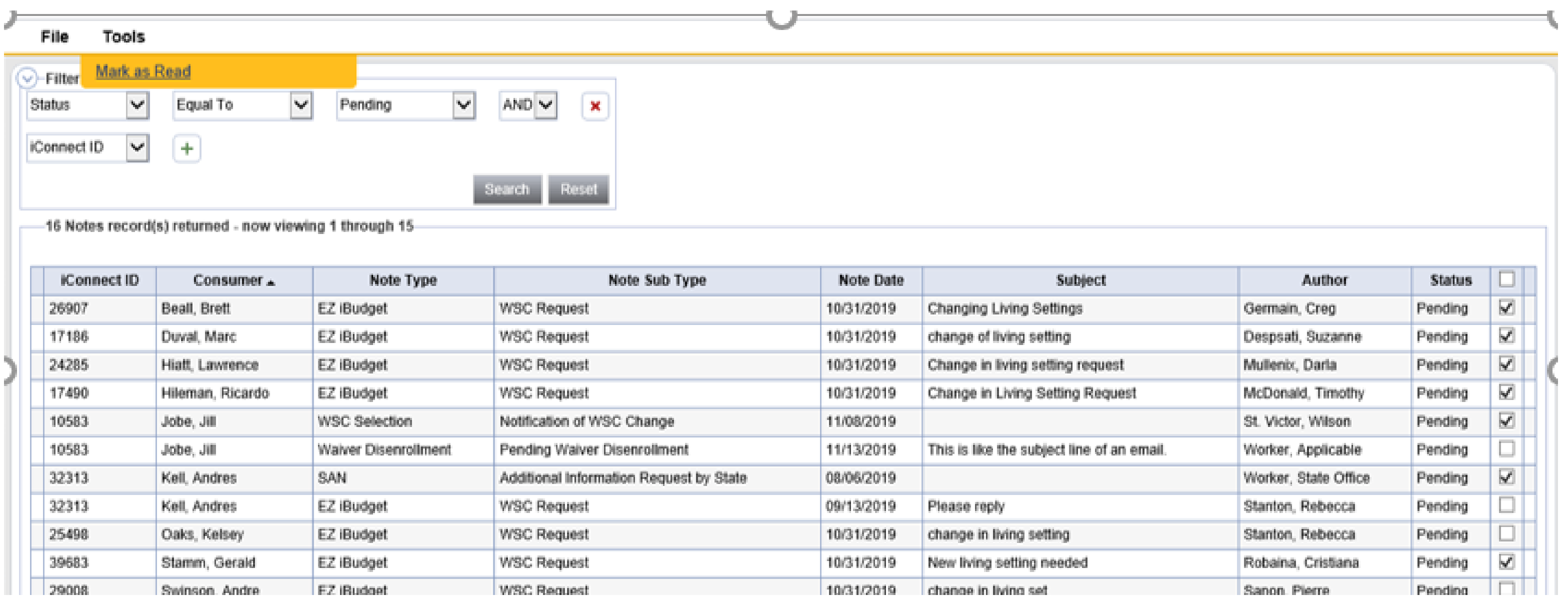
How to Mark a Note as Read

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.



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**.



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

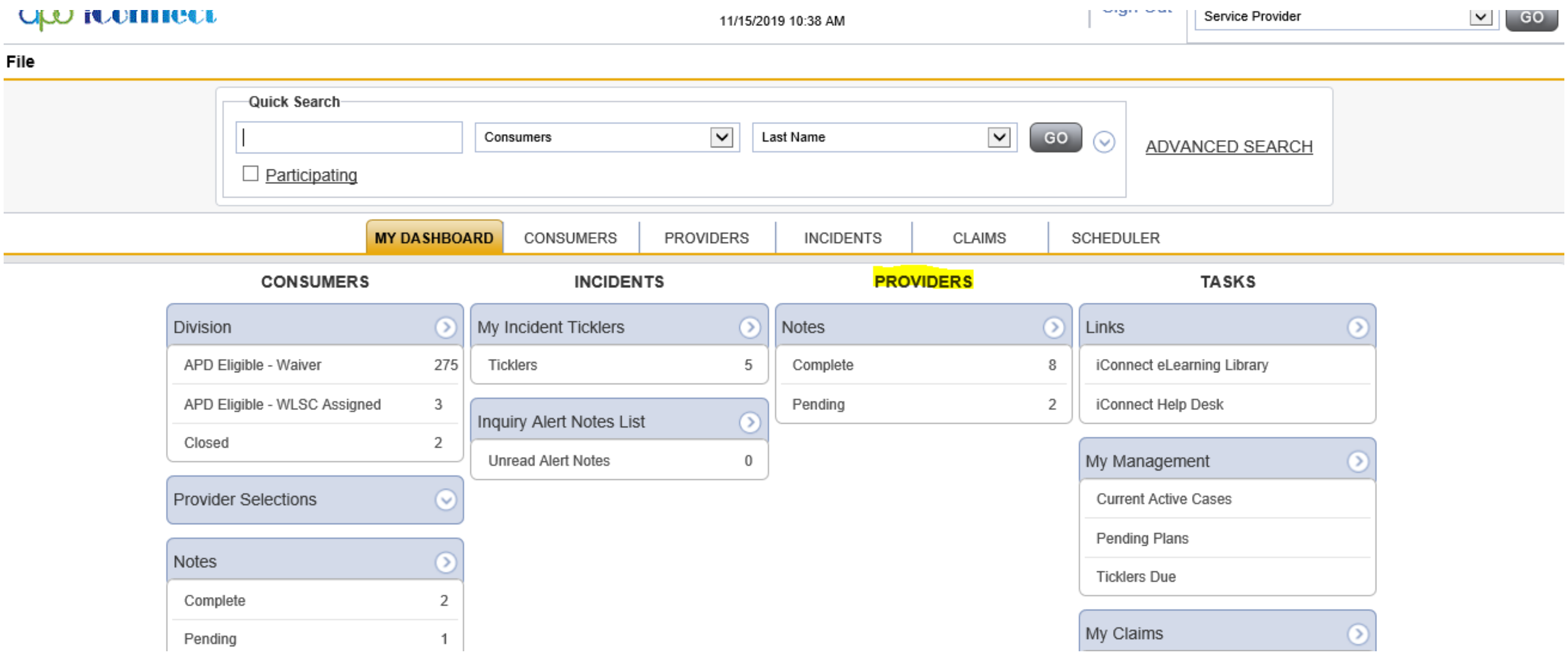
How to Mark a Note as Read

- 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

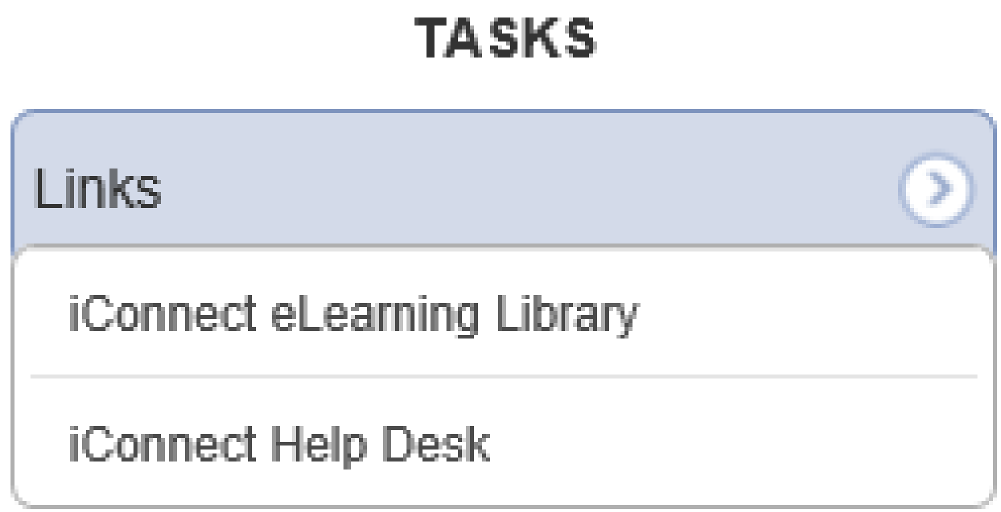
- The **only** difference between adding a Note in a consumer record and a provider record is where the Note shows on your My Dashboard.
- When someone sends a Note or replies to a Note from within a provider record, it will show under the provider section of your My Dashboard.

Add a Note in a Provider Record

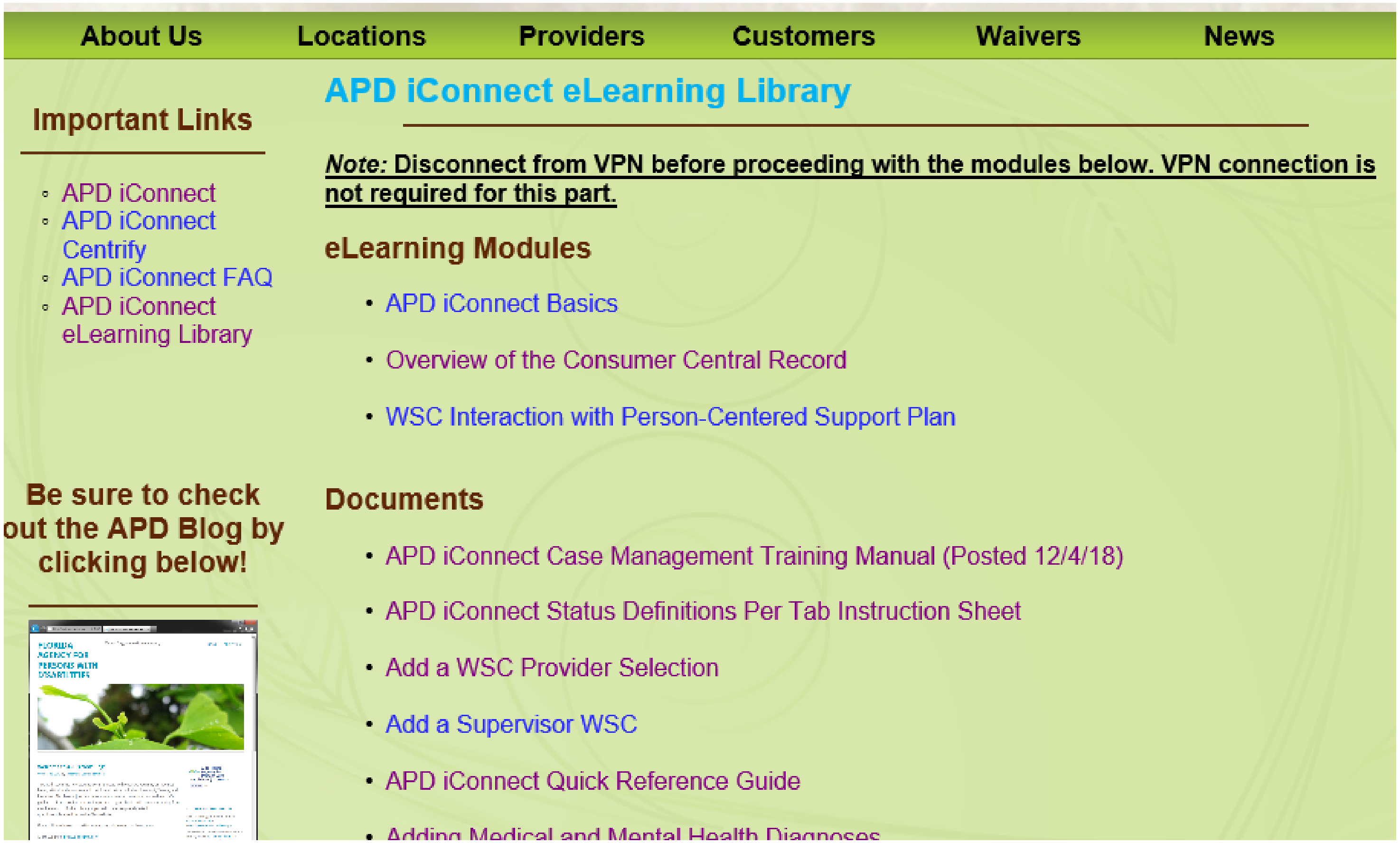


eLearning Library

- 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



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Important Links

- APD iConnect
- APD iConnect Centrify
- 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 .

apd

agency for persons with disabilities

State of Florida