apd iConnect

Introduction

Although Single Sign On (SSO) via CyberArk creates a worker record in APD iConnect, deactivating a user account in ID PASS does not deactivate a worker record in APD iConnect.

This can lead to confusion because an employee can be deactivated in ID PASS, but still show on the Workers list in the Provider's record. When the former employee is a Waiver Support Coordinator (WSC), it is even more challenging, because WSCs are chosen from a dropdown list in many functions within APD iConnect.

This job aid will walk through the steps to deactivate a WSC worker record and a non-WSC worker record.

WSC Employee – Region Notification (QOs Only)

When the former employee is a WSC, the Qualified Organization (QO) will need to notify the region via an iConnect note; Chapter 65G-14 outlines the requirements of this notification. This also applies when a WSC goes out on leave of absence (LOA)

Upon receipt of the notification, the region will then submit a SARF via help desk ticket.

This should be done as soon as the QO becomes aware of the WSC's separation date and must be completed before the former WSC's Worker Record is deactivated.

1. Using the Service Provider role, the QO owner or designee will navigate to the business' provider record in APD iConnect.
2. Click on the Notes tab and then File > Add Note
3. Update the Note as follows
   a. Note Type = "WSC Separation" or "WSC LOA"
   b. Note Type = "SARF Request"
   c. Description = "MM/DD/YYYY – WSC's Name" Last Day/Separation
      i. Example: 09/25/2022 – Susan Worker Last Day/Separation
   d. Note = Include 65G-14 F.A.C. details

> i. Name of temporary WSC who will serve consumers during transition period
>
> ii. Why the WSC is leaving/left the QO (voluntary/involuntary)
>
> iii. QO Table of Organization
>
> iv. (if known) whether the WSC is moving to a new QO, starting their own QO, or has other plans.

   e. Status = Pending

   f. Add Attachment = Attach caseload list

<p style="text-align:center"><strong style="color:red">DO NOT ATTACH SARF TO THIS NOTE</p>

   g. Note Recipients = Provider Enrollment Specialist/Liaison and Waiver Workstream Lead

The region <u>where the WSC physically lives</u> will monitor their My Dashboard and upon receipt of the note, will process a **Modify SARF if the WSC is going to a new QO** (external to APD iConnect). **If the WSC is not going to a new QO, then the region will process a Separation SARF.**

NOTE: If the region processing the Modify SARF knows where the WSC is going, they will also handle the SARF to add the WSC to the new QO.

   a. The region Waiver Lead will generate a list of the separating WSC's caseload and cross reference it with the attachment on the pending note

   b. The region Waiver Lead will execute the Caseload Transfer Utility and transfer the caseload to the temporary WSC(s) identified in the pending note

> i. NOTE: The Caseload Transfer Utility does not provide the option of checking the "Temporary Primary Worker Assignment" checkbox on the associated Division record. The region will navigate to each consumer's record and edit the Division record by checking the "Temporary Primary Worker Assignment" checkbox.

   c. The region will then respond to the Pending Note and update as follows:

> i. Note = Consumers transferred to temporary WSC, pending WSC selection process
>
> ii. Status = Complete
>
> iii. Add appropriate QO Owner and Provider Enrollment Specialist/Liaison as note recipient

2. The region will initiate the WSC Selection process while the SARF is being processed.

   a. If the WSC is moving to a new QO and does not yet have a login under that QO, and the consumer(s) communicates a choice to follow the WSC, the region will temporarily reassign new QO Owner as the consumer's primary worker, checking the "Temporary Primary Worker Assignment" checkbox on the consumer's Division record.

   b. The new QO will follow the process to update the Provider Selections, Plan, Planned Services, and Authorizations.

   c. Once the WSC has successfully logged into APD iConnect under the new QO, the region will confirm the caseload with the new QO and complete the caseload transfer and uncheck the "Temporary Primary Worker Assignment" checkbox on each consumer's associated Division record.

Deactivate in ID PASS (All Agency Providers and QOs)

When an employee leaves an agency, the business owner or their designated agent can deactivate the former employee's user access account in ID PASS. This will prevent the former employee from being able to login to APD iConnect.
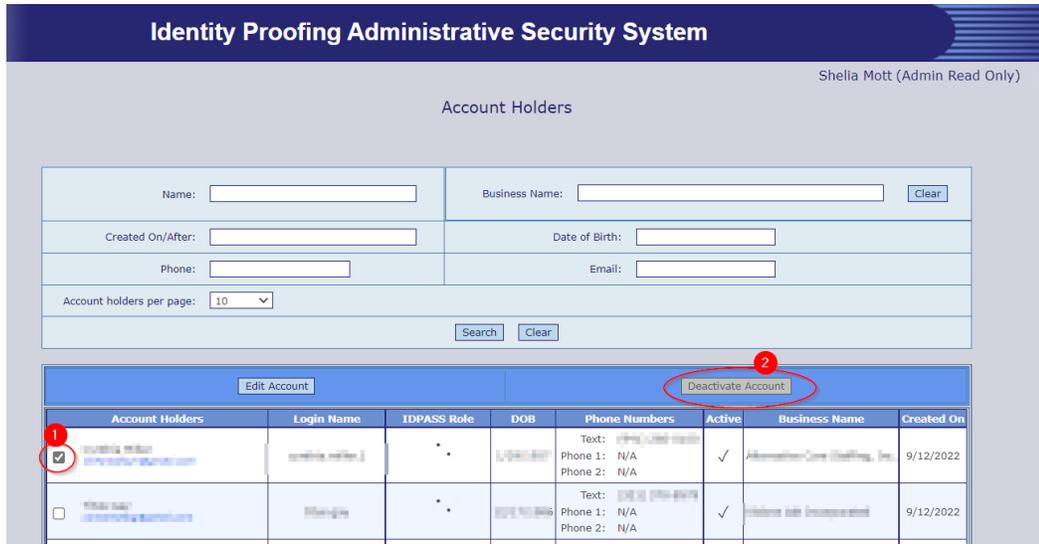
Deactivate APD iConnect Worker Record (All Agency Providers and QOs)

Although the former employee cannot log into APD iConnect once they have been deactivated in ID PASS, their name will still appear on the Workers tab of the provider record. For non-WSC employees this can be completed once they have been deactivated in ID PASS.

REMINDER: Do not complete for former WSC employees until the Region Notification process above has been completed.

1. Using the Service Provider role, navigate to your business' provider record in APD iConnect, and select the "Workers" tab

2. In the list view grid, find and click on the name of the former employee.
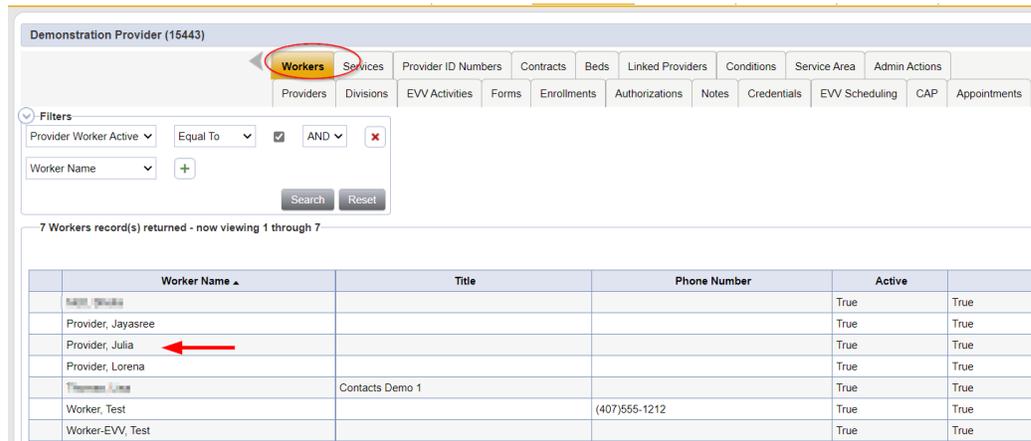
3. This will open the Worker page, check the "Exclude" checkbox. Then File > Save and Close Worker
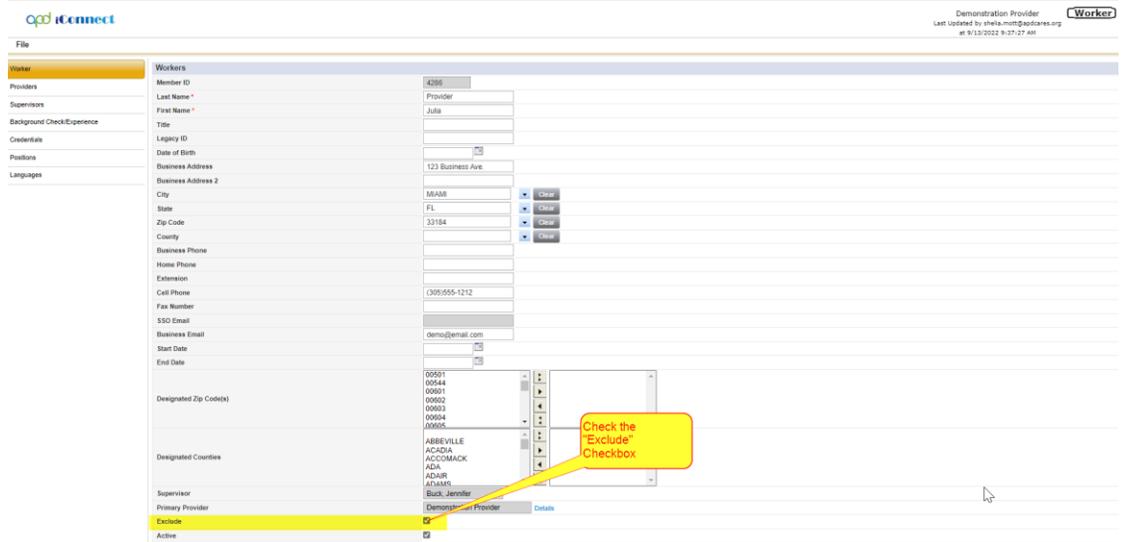
4. The former employee no longer appears in the list view grid on the Workers tab.

Demonstration Provider (15443)

| Workers | Services | Provider ID Numbers | Contracts | Beds | Linked Providers | Conditions | Service |

| Providers | Divisions | EVV Activities | Forms | Enrollments | Authorizations | Notes | Credentials | EV |

Filters

| Provider Worker Active ▾ | Equal To ▾ | ☑ | AND ▾ | ✖ |

| Worker Name ▾ | ➕ |

Search   Reset

6 Workers record(s) returned - now viewing 1 through 6

Worker Name ▲	Title	Phone Number
▒▒▒, ▒▒▒	*Julia Provider is no longer shown as a Worker for Demonstration provider.*	
Provider, Jayasree		
Provider, Lorena		
Thomas, Lisa	Contacts Demo 1	
Worker, Test		(407)555-1212
Worker-EVV, Test		