

Adding a Supervisor to a Worker Record Instruction Sheet

- 1. WSC Agency owners will log into iConnect, using the Service Provider Role.
- 2. Click the Providers Chapter.
- 3. In the Quick Search field at the top of the page,
  - a. WSC's and Providers enter part or all of your **Company** (Provider) Name.
- 4. Ensure the "Provider Name" filter is selected.
- 5. Click Go.

opd iConnect		Welcome, 12/19/2018 4:37 PM	Advanced Search Sign Out	Role Service Provider
File				
	Quick Search WSC Agency Name X Providers	Provider ID		RCH
	MY DASHBOARD CONSUMERS	OVIDERS INCIDENTS CI	LAIMS SCHEDULER	

- 6. Search results are returned.
  - a. If only one record exists, the Provider record displays.
  - b. If more than one record exists, the results are displayed. Select your agency's provider record. The Provider record displays.
- 7. Select the **Workers** tab. Locate the Worker's record and click to open it.

	MY DASH	BOARD	CONSUM	ERS PF	ROVIDERS	INC	DENT	rs c	LAIMS	SCH	EDULE	R	UTILITIES	REPORTS
a TEST Provider (10002)														
	Workers	Services	Provider	ID Numbers	Contracts	Beds	Linke	d Providers	Aliases	Condition	s Sei	rvice Area	Admin Action	s
	Providers	Divisions	Forms	Enrollments	Authoriza	tions N	lotes	Credentials	EVV S	cheduling	CAP	Appointr	nents	
Search     Reset       -52 Workers record(s) returned - now viewing 1 through 15														
	Worker Na	me 🔺			Title			Phone	e Number		Acti	ive	Pro	vider Worker Active
Application,	Harmony									1	rue	T	rue	
+														

8. The worker detail page displays.





## Add a Supervisor WSC.docx

opd iConnec	t		A TEST Provider Worker Last Updated by jbuck at 10/8/2018 12:19:08 PM
File			
Worker	Workers		
Providers	Member ID	223	
	Last Name *	Buck	
Supervisors	First Name *	Jennifer	
Background Check/Experience	Title	Licensing Specialist	
Credentials	SSN	Unmask	
Positions	Date of Birth		
	Home Address	55 South Washington St.	
Languages	Home Address 2		
Forms	City	JACKSONVILLE Clear	
	State	FL Clear	
	Zip Code	32244 Clear	
	County	DUVAL Clear	
	Home Phone	(111)111-1111	
	Work Phone	(222)222-2222	
	Extension		
	Cell Phone	(333)333-3333	
	Fax Number		
	Email	info@wellsky.com	
	Start Date	01/01/2018	
	End Date		

## 9. Select the Supervisors tab. Select File > Add Supervisor.

opd iConnec	t		A TEST Provider	Supervisors
File				
Add Supervisor	s			
Print	n Reset			
Close Supervisors	ord(s) returned			
Supervisors				
Background Check/Experience				
Credentials				
Positions				
Languages				
Forms				

- 10. The Supervisor details page displays. Update the following fields:
  - a. Supervisor Name = search for and select the supervisor's name
  - b. Start Date = defaults to today and is required. Can be edited if needed
  - c. End Date = is blank. Will remain blank until this is no longer the supervisor for the worker.
  - d. Primary Supervisor = by default, this field is checked and read only when this is the first supervisor record to be added for the worker. When/if a second supervisor record is added, this field will be unchecked and editable because the new supervisor





may be replacing the original primary supervisor and it will be up to the user to check the field or not.

e. Active = by default, this field is checked

Opd iConnect		A TEST Provider Supervisor
File		
Supervisor		
Supervisor Name *	Reed, Monica	~
Start Date *	11/15/2018	
End Date		
Primary Supervisor	$\checkmark$	
Active		

- 11. When complete, from the **File** menu > Select **Save and Close Supervisor.**
- 12. The page refreshes and a summary of the Supervisor details is displayed in the Supervisor List view.

apod iConnec	t					A TEST Provider   Supervisors
File						
Worker	⊖-F Se	ilters earch Reset				
Providers	_					
Supervisors						
Background Check/Experience		Supe	ervisor Name	Primary	Start Date	End Date 🔺
Overfaction		Buck, Jennifer		Yes	11/15/2018	
Credentials						
Positions			<< First < Previous Retri	ieve 15 Records at a ti	me Next > Last >>	
Languages						
Forms						

13. The Supervisor has been added to the Worker Record. This process can be completed multiple times if there are back up supervisors. Only one can be marked as the primary supervisor.

