

## Adding a WSC Provider Selection in A Consumer's Record

### Introduction

In iConnect, there are three possible ways to access a consumer's record.

1. Be named as a primary or secondary worker on the APD Division record
2. Have a valid authorization
3. Have an open Provider Selection record

When iConnect authorizations come online, all WSC Agency Owners will be able to access ("see") records for all consumer records served by the agency. However, as authorizations were not included in the initial iConnect launch in December 2018, this workaround will allow WSC Agency Owners to see and access all consumers served by the agency.

### Roles Involved

- WSC / CDC

The steps delineated below must be completed within each consumer's record. They can be completed with **only** the WSC / CDC role. WSC supervisors who are also WSCs (i.e. have the WSC / CDC role), can complete this for consumers on the direct report's caseload.

### Adding the Provider Selection Record

1. Navigate to the Consumer's record and click **Provider Selection > File > Add Provider**. The provider detail page will display.
2. Update the following fields:
  - a. Division = default to APD
  - b. Selected by = defaults to Self
  - c. Selection date = defaults to today
  - d. Provider = select the ellipsis to search for and select the your WSC Agency
  - e. Referral Type = Waiver Support Coordinator
  - f. Disposition = Open (note: other dispositions may trigger a tickler that is not necessary)
  - g. Disposition Date = defaults to today

- h. Provider Worker = search for and select the WSC Worker.
- i. WSC Transfer Effective Date = leave blank
- j. WSC Transfer End Date = leave blank
- k. Comments = Add a comment that the selection record is being created to provide WSC Agency level access to the consumer's record.

3. Click **File > Save and Close Provider.**

Division *	APD ▾
Selected By	WSC, Owner <span>...</span> <span>Clear</span> <a href="#">Details</a>
Selection Date	01/14/2019 <span>📅</span>
Provider *	WSC Agency1 <span>...</span> <span>Clear</span> <a href="#">Details</a>
Referral Type *	Waiver Support Coordinator ▾*
Disposition *	Open ▾
Disposition Date	01/14/2019 <span>📅</span>
Provider Worker *	WSC, Best <span>...</span> <span>Clear</span> <a href="#">Details</a>
WSC Transfer Effective Date	<span>📅</span>
WSC Transfer End Date	<span>📅</span>
Comments	Provider selection record being created to allow the WSC Agency Owner access to consumer's record in the absence of an iConnect authorization. <span>⬆</span> <span>⬇</span>