Assigning the Service Log Notification Position to a Worker

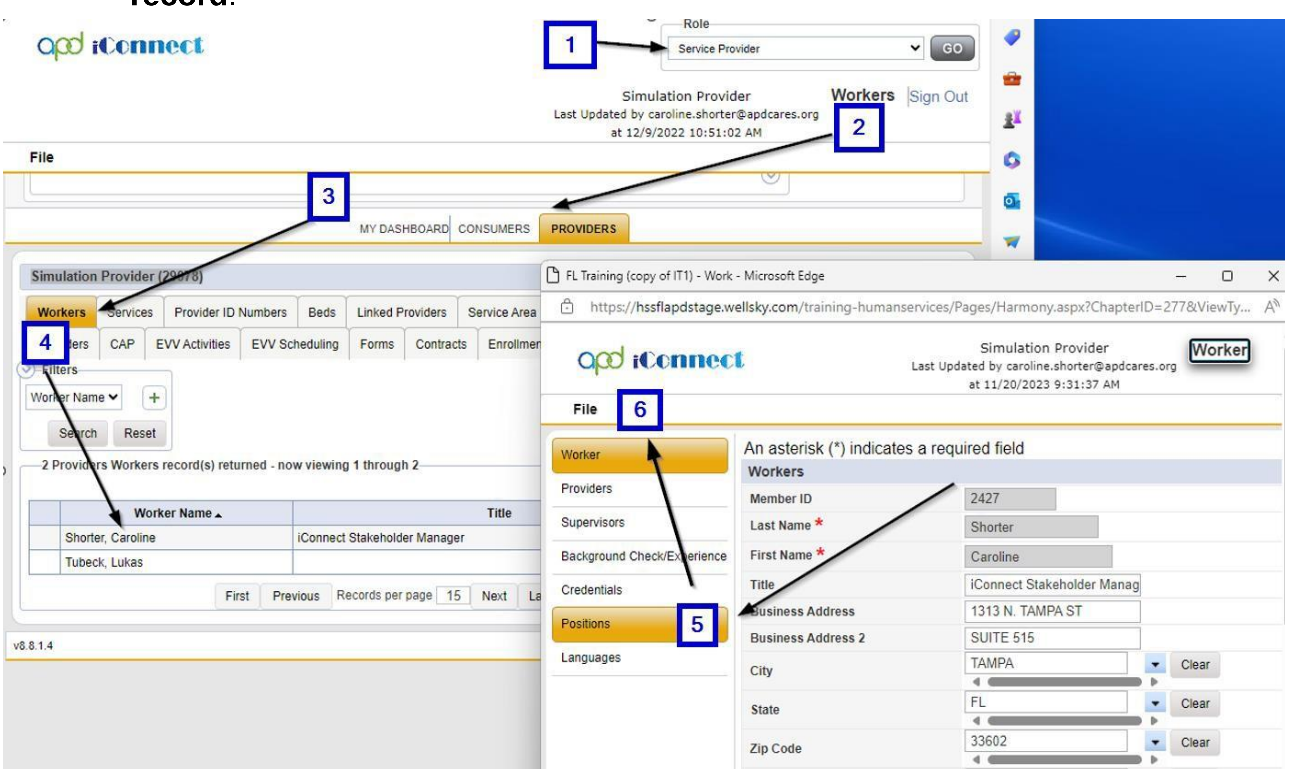
The purpose of this job aid is to allow the service provider to assign the Service Log Notification position to the appropriate worker or workers. This feature will remind the service providers that no service log entry has been made in iConnect within the 30 days of the authorization end date.

To ensure that the appropriate staff receives the Service Log Notification Tickler, the service provider will need to update the staff member's worker record with the position, Service Log Notification.

Multiple workers can be set up to receive these ticklers. Workers will need to check iConnect regularly and remember to mark Ticklers as Completed once reviewed.

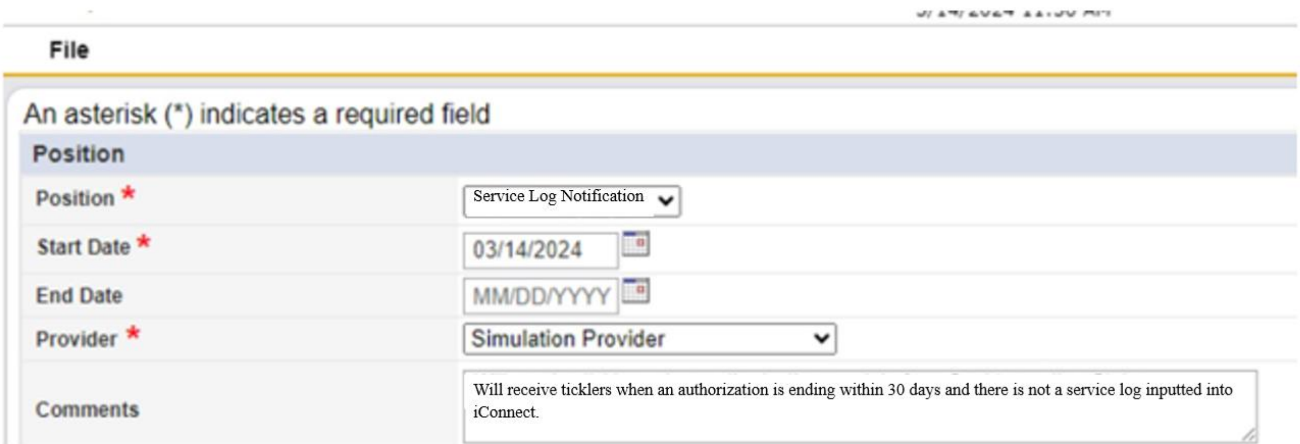
Step 1: Setting up the appropriate workers to receive ticklers.

1. Service providers will log into iConnect and set their **Role** to **Service Provider**.
2. Navigate to their **Provider Record**
3. Navigate to their **Worker tab**
4. Select the appropriate workers to receive these ticklers from within their **Worker record**.



5. From within the Worker Record, Open the **Positions tab**.

6. Use **File** to **Add** Position and fill in the fields:
    a) Position = Service Log Notification
    b) Start Date = Today's Date *(There's no way to trigger ticklers in the past)*
    c) Provider = Name of Agency/Qualified Organization
    d) Add Comments (if needed by the Agency Owner)

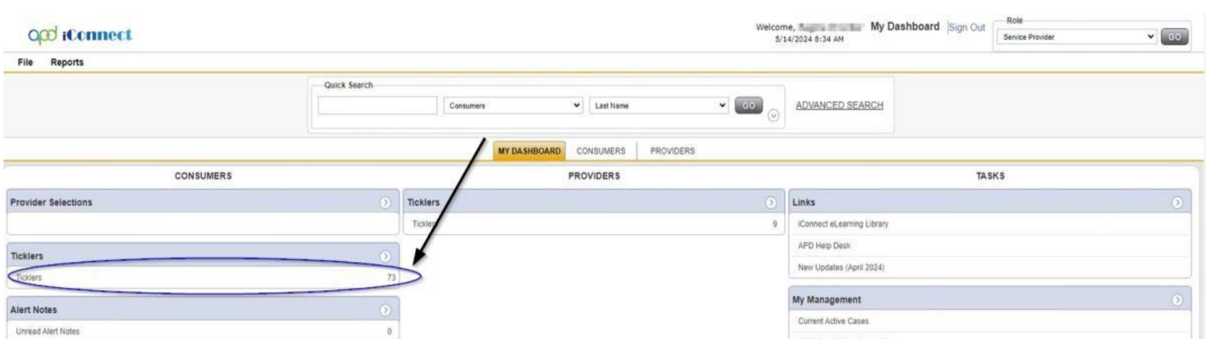


Step 2: iConnect will generate a tickler for every client that has an authorization and does not have a service log entry made in iConnect within the 30 days of the authorization end date. The tickler will only trigger once for the authorization. If there are service logs within the 30 days of the end date of the authorization, a tickler will not generate.

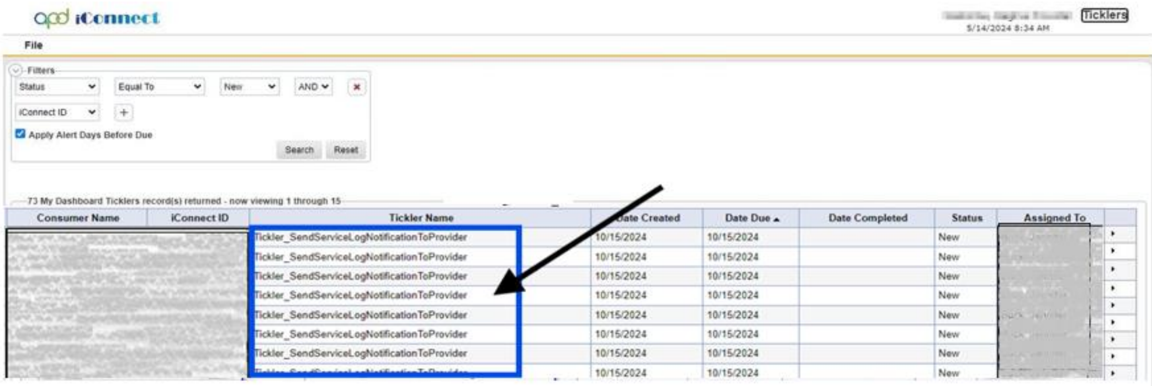
1. The Worker identified as the Service Log Notification must log into iConnect.

2. Locate the **Tickler panel** under the Consumer Column.

3. Select the **Ticklers** to open the Tickler list view grid.

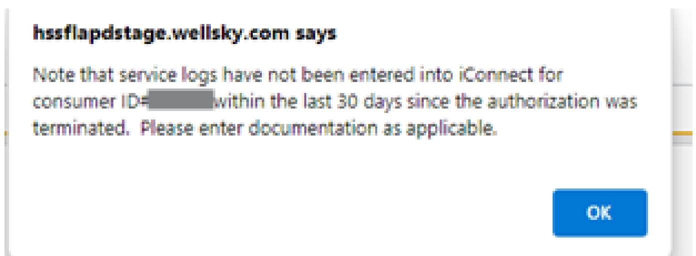


4. Locate the tickler: "Tickler_SendSerivceLogNotificationToProvider."



5. Select one of the ticklers to view additional details.

6. The additional details window provides the consumer's iConnect ID and informs the provider that authorization was terminated and there are no service logs entered within the last 30 days.



7. Once the details have been reviewed, navigate to the consumer's record to review provider documentation and determine if further action is needed by the service provider worker for the client.

8. Use the carats on the right to mark the tickler as Complete to remove it from the list of ticklers on My Dashboard.