



**State of Florida
Agency for Persons with Disabilities**

iConnect
New Licensing Facility Application Request Training Manual
August 6, 2024

Table of Contents

Introduction.....	4
Submit Online Application Request.....	4
Assign Worker	7
Access Prospective Applicant Queue.....	10
Provider Search and Promote	12
NEW! No Parent Record Exists – Partner with Provider Enrollment for the creation of the Placeholder Parent Provider Record	17
NEW! Link to Existing or Placeholder Parent Provider Record and Add Applicant License Record.....	20
NEW! User Provisioning and iConnect Access	24
As Needed: Reject Prospective Applicant Provider.....	24
New Licensed Facility Application	26
Introduction.....	26
Complete Facility Application Form.....	26
Complete Licensed Capacity Form.....	29
Add Other Qualifying Documentation	31
Application Submitted Note	34
Access Ticklers	36
New! Abuse Record Search	38
Complete Application.....	41
Schedule Site Visit.....	45
As Needed: Reschedule Site Visit Appointment	48
Complete Site Visit.....	51
Complete Appointment.....	52
Complete Checklists	54
Complete Application Package Checklist	56
Site Visit No Violations Note	58
Supervisor Review	60
Supervisor Approval.....	62
UPDATED: Edit License Information	65
ROM Review.....	67

ROM Approval	70
Signed License Certificate Note	72
As Needed: Site Visit Violations Note	75
As Needed: Corrective Actions Update.....	77
As Needed: Add Appointment for CMS Compliance Site Visit	80
As Needed: CMS Compliance Site Visit Complete Note – No Issues.....	83
As Needed: CMS Compliance Site Visit Complete Note – Issues	85
As Needed: Add CMS Compliance License Information	87
As Needed: Link Child Provider	89
As Needed: Initial Application with Errors	91
As Needed: Update Application	94
As Needed: Further Documentation Required	96
As Needed: Requested Information	99
As Needed: Abandoned Application.....	105
As Needed: Supervisor Denial.....	107
As Needed: ROM Denial	109
NEW! As Needed: Abandoned and Denied Applications – End iConnect Access to Placeholder Parent Provider Record.....	112
NEW! As Needed: End iConnect Access to Applicant Record by updating the Applicant License Record to Closed.....	115

Chapter 3 | Online Application Request

Introduction

New Prospective Applicants seeking licensure of residential facilities will contact APD by phone, email or in person and will be directed to the link for the Online Application Request form. The Prospective applicant will also be instructed to do a background screening. The Online Application Request will be used for all interested new prospective applicants.

Submit Online Application Request

1. Access the Online Application Request via the URL:

<https://floridaapd.wellsky.com/assessments/?WebIntake=DE588ADD-286E-47FA-A5FF-06494042E9D8>

Online Application Request for New Providers

This questionnaire will help APD assess individuals who are interested in becoming an APD provider to determine whether the potential applicant is eligible to move forward. Please note: This is not a provider application and does not warrant either expressly or by implication that an individual is permitted to render services. This tool can be used by:

- Individuals or Parties wishing to open a licensed Residential facility

Required questions are marked with a red **required** label.

Prospective Licensed Applicant Information Section

Prospective Licensed Applicant Business Name **required**

First and Last Name if a Solo Provider

Enter response...

Prospective Licensed Applicant Business Telephone Number **required**

Enter response...

Prospective Licensed Applicant Email Address **required**

Enter response...

Prospective Licensed Applicant EIN/Tax ID **required**

Include dashes

Enter response...

2. Complete all required fields on the Online Application Request Form

Prospective Licensed Applicant Information Section

Prospective Licensed Applicant Business Name **required** ←

First and Last Name if a Solo Provider
Enter response...

Prospective Licensed Applicant Business Telephone Number **required** ←

Enter response...

Prospective Licensed Applicant Email Address **required** ←

Enter response...

Prospective Licensed Applicant EIN/Tax ID **required** ←

Include dashes
Enter response...

Prospective Licensed Applicant Region **required** ←

Unanswered Central Northeast Northwest Suncoast Southeast Southern

Prospective Licensed Home Address Section

Prospective Licensed Home Street Address **required** ←

Enter response...

3. When finished with all sections, click the Submit button and then the Success Message will be displayed.

a. *The reference number included will be the prospective licensed facility iConnect ID number.*

Thank you for completing the Online Application Request for New Providers. Click "Submit" to submit your request. Once APD reviews the request, you will be contacted by an APD staff member either by phone or email.

Please note: Your request will not be processed until you click "Submit" and receive a "Success" message.



Success!

Thank you for completing the APD Online Application Request for New Providers. Please keep this reference number for your records. An APD staff member will be contacting you within 30 calendar days.

Please keep this reference number for your records: **10084**

[Return to APDCARES](#)

 Print

4. If the application request needs to be cancelled, click the Cancel button and then click Yes.

Cancel Submission

Are you **sure** you want to cancel without submitting the information?

*Please note: If you cancel the submission, your request will **not** be submitted for processing and it will **not** be saved. You will need to complete a brand new Online Application request.*



No

Yes

Assign Worker

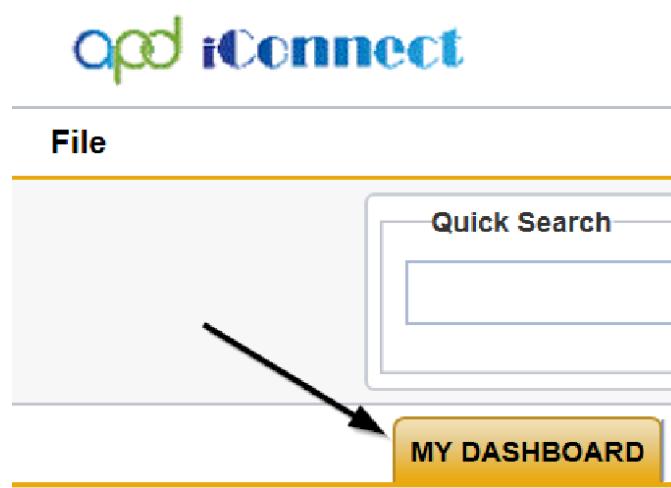


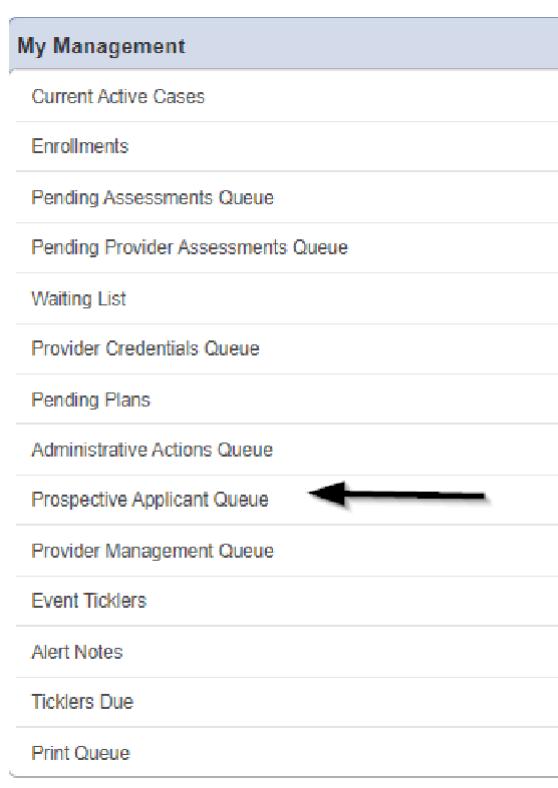
Once the Online Application Request has been submitted by the Provider applicant, the Region will monitor the Prospective Applicant Queue via the My Dashboard > My Management area of iConnect. They will assign a licensing specialist if appropriate. Some regions may need to assign a different worker than the one who works the queue. If so, they will add a note and add the assigned worker as the note recipient.

1. Set “Role” = Region QA Workstream Worker then click **Go**.

A screenshot of a web form showing a dropdown menu labeled 'Role' with the option 'Region QA Workstream Worker' selected. To the right of the dropdown is a 'GO' button with a black arrow pointing to it.

2. The user can access the Prospective Applicant Queue via **My Dashboard**.
 - a. Go to **My Dashboard** > **Tasks** and scroll down to the My Management Panel. Click on the **Prospective Applicant Queue** link to open the Queue:





3. Select the Prospective applicant record via the hyperlink via the Applicant's record.

My Dashboard Prospective Applicant Queue record(s) returned - now viewing 1 through 3

	Disposition	Online Application Date	Provider Name	Provider Region
	Pending	06/29/2023	Test Provider	NORTHEAST
	Pending	08/18/2023	Test Region Provider	Northeast
	Pending	08/20/2023	Test Provider	Northeast

4. The Applicant's record will display. Navigate to the **Providers > Notes** tab

File Reports

MY DAS ID CARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SOC

A TEST Provider (10002)

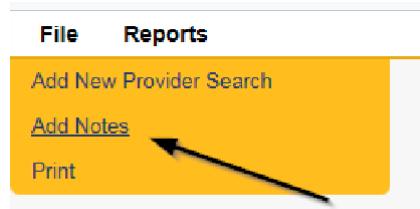
Workers Services Provider IJ Numbers Contracts B... Providers Divisions Forms Enrollments Authorizations Notes Credentials DM Scheduling

Filters

Note Type Equal To AND Note Date

Search Reset

5. Click **File > Add Notes**

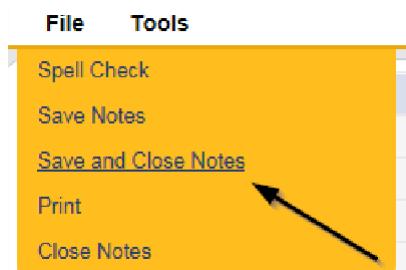


6. In the new Note record, update the following fields:

- a. "Division" = APD
- b. "Associated Form ID#" = Enter Form ID# if applicable
- c. "Note Type" = Application Request
- d. "Note Subtype" = Assign Worker
- e. "Description" = Assign Worker
- f. "Note" = Enter notes
- g. "Status" = Complete
- h. Click the Lookup button on the "Add Note Recipient" to add the *QA Workstream Worker or other as applicable* as the Note Recipient
- i. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

A screenshot of the 'Notes Details' form. The form includes fields for Division (APD), Note By (Reed, Monica), Note Date (09/24/2023), Associated Form ID# (352), Note Type (Application Request), Note Sub-Type (Assign Worker), Description (Assign Worker), Note (Enter notes), Status (Complete), Date Completed (09/24/2023), and a Note Recipients section. Arrows point to the 'Associated Form ID#', 'Note Type', 'Description', 'Note', and 'Status' fields.

7. When finished click **File > Save and Close Notes**



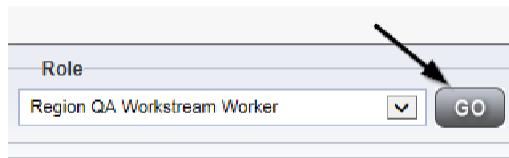
Access Prospective Applicant Queue



Once the Online Application Request has been submitted by the prospective applicant or someone has been assigned to work the new applicant record, they will pick up the phone and talk to the prospective applicant.

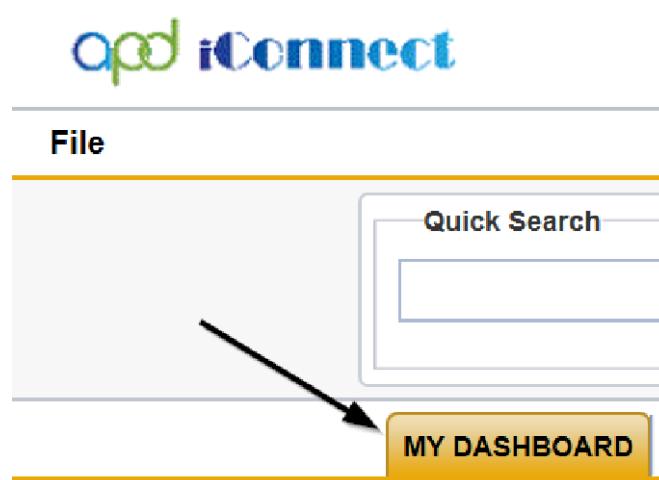
NOTE: There will be no visual indicator on My Dashboard > Prospective Applicant Queue that there has been an assignment.

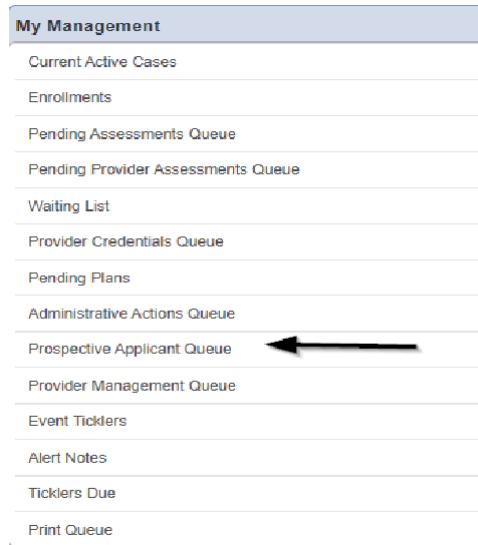
1. Set “Role” = Region QA Workstream Worker then click **Go**.



2. The user can access the Prospective Applicant Queue via **My Dashboard**.

- Go to **My Dashboard > Tasks** and scroll down to the My Management Panel. Click on the **Prospective Applicant Queue** link to open the Queue:





3. Use the multi variable search to narrow down the results in the Queue. Click **Search** to view all submitted Online Application requests. **Select** the Prospective applicant record via the checkbox at the end of the Applicant's record.

Disposition	Online Application Date	Provider Name	Provider Region
Pending	06/12/2016	APD Test Provider	<input type="checkbox"/>
Pending	04/17/2017	APD Test Provider	<input checked="" type="checkbox"/>

If the Prospective Applicant does not have a current or active APD licensed residential facility and/or MWSA, please validate the following:

- Valid photo ID
- Meeting with applicant – Face-to-Face or Zoom/Teams
- Ask if applicant has begun process of obtaining a Medicaid Provider Number
- Explain the application and enrollment steps for licensure and MWSA
- Inquire if they have completed Background screening process
- Ask about qualifications and experience



Provider Search and Promote

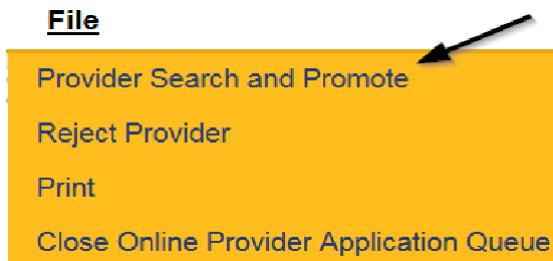


When the QA Workstream Worker has the information needed from the Prospective Applicant record and can proceed with initiating the provision process, they will "promote" the record from the Prospective Applicant Queue to a non-active provider record.

1. Select the prospective applicant's record in the Prospective Applicant queue by selecting the checkbox at the end of the record

	Disposition	Online Application Date	Provider Name	Provider Region	
	Pending	06/29/2023	Test Provider	NORTHEAST	<input type="checkbox"/>
	Pending	09/18/2023	Test Region Provider	Northwest	<input type="checkbox"/>
	Pending	09/20/2023	Test Provider	Northeast	<input type="checkbox"/>

2. Select **File > Provider Search and Promote** to search to see if a Provider record already exists for that Service Provider



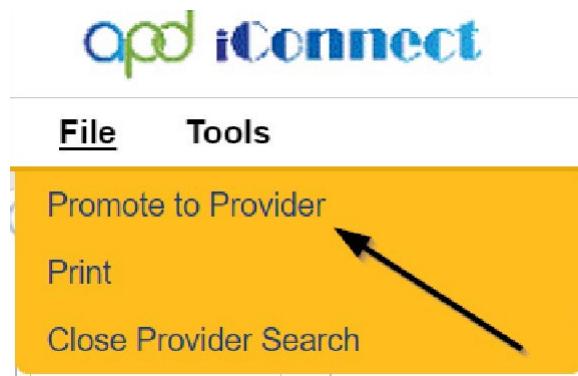
3. On the Provider Search screen, Click **Search**. The search will either return no matching records or a list view grid of matching records. The user will be able to click on the matching records to see more details and determine if the existing Provider record matches the New Online Application Request.
4. In Addition to searching for the Licensed Facility, the Licensing Specialist must complete a thorough search for the Parent Provider Record to determine whether the New Prospective Applicant Record will need to be linked to an existing record or if Provider Enrollment must be contacted to add a Placeholder Parent Record.

IMPORTANT: If a parent or facility duplicate record is created, these CANNOT be deleted. It must be closed through State Office, not deleted.

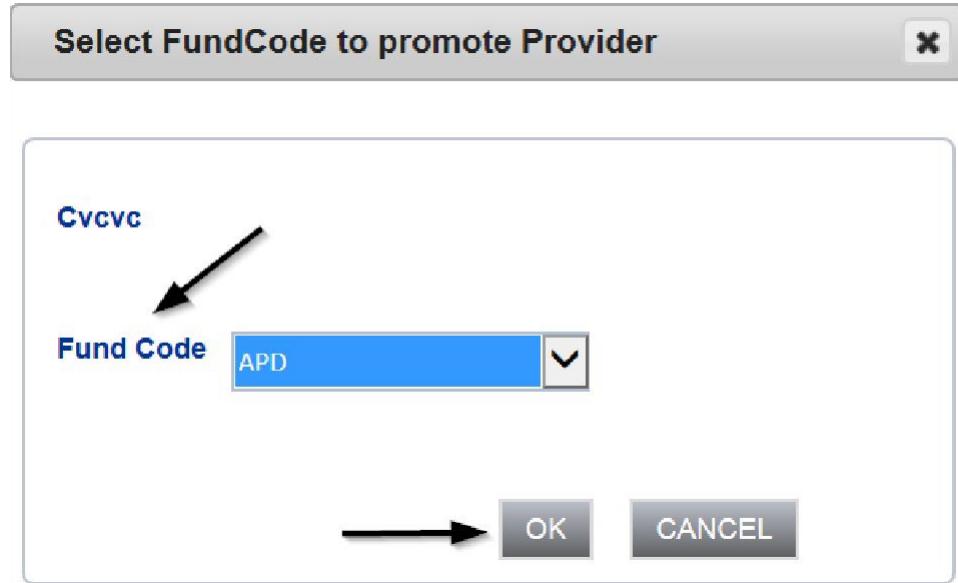
The screenshot shows the APD iConnect software interface. At the top, there is a toolbar with 'File' and 'Tools' tabs. Below the toolbar is a 'Filters' section with dropdown menus for 'FIN/SSN' (set to 'Equal To' and '123456'), 'Region' (set to 'Contains' and 'Northeast'), and 'Provider Name'. There are also 'AND' and 'Search' buttons. The main area displays a table with one row of data. The columns are 'Provider ID', 'Provider Name', 'EIN/SSN', 'City', and 'State'. The data row shows '2131', 'test Provider Prospective Applicant', '123456', 'Jacksonville', and 'FL'. Below the table, a message says '2 My Dashboard Provider Search record(s) returned now viewing 1 through 2'.

Provider ID	Provider Name	EIN/SSN	City	State
2131	test Provider Prospective Applicant	123456	Jacksonville	FL

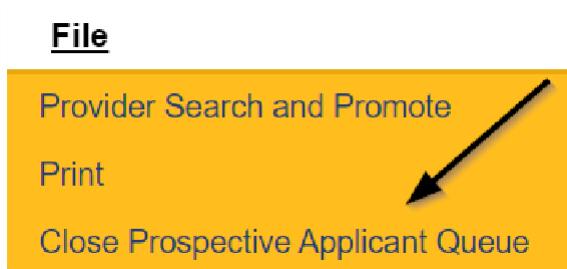
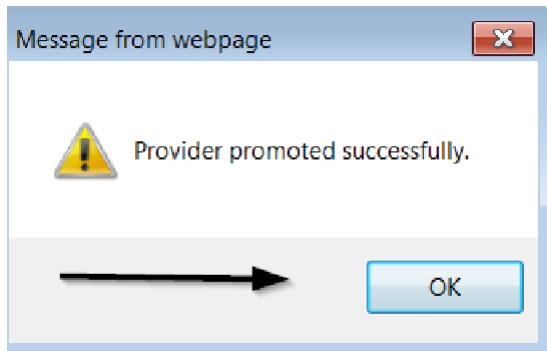
5. If the displayed results don't match the prospective applicant's record, then Select **File > Promote to Provider**



6. The Select Fund Code pop-up box will appear. Select the Fund Code as **APD** and then Click **OK**



7. Click **OK** on the pop-up message box and then **File > Close Prospective Applicant Queue**



8. The Service Provider Division will be changed to “Submitted Online,” which will function like a Status of “Open.”

Cvcvc (10087)								
Providers	Workers	Services	Provider ID Numbers	Contracts	Beds	Linked Providers	Aliases	Conditions
	Divisions	Forms	Enrollments	Authorizations	Notes	Credentials	EVV Scheduling	...
Filters								
	Division							
	<input type="button" value="Search"/>	<input type="button" value="Reset"/>						
1 Divisions record(s) returned - now viewing 1 through 1								
	Division		Disposition		Open Date			
	APD	Submitted Online			12/31/2018			

9. The Prospective Applicant will be active and available for selection in any drop-down lists, so the **Exclude from Selection** field on the Provider demographics details page needs have the checkbox enabled until the application process has been completed.

NOTE: Group Homes and Fosters Home Providers would always have the “Exclude from Selection” field enabled AFTER they are approved. They do need to be visible for adding as a Provider for selection when a consumer moves into a Group Home/Foster Home. The Licensed Facility needs to be selected and this selection would be included in any reporting.

Test Provider (21354)

Workers	Providers
Basic Information	
Provider Name	Test Provider
DBA (if applicable)/Facility Name	
Licensed Home licensed for capacity	
Active	Yes
WSC QO	
External	Yes
Exclude from Selection	Yes
Specialist/Liaison	

10. Navigate to the Provider > Demographics tab, Select File > Edit Provider

apd iConnect

A Test Provider
Last Updated by mreed@apdcare.org
at 7/12/2022 9:22:41 AM

Providers Sign Out Role
Region QA Workstream Worker GO

File Edit Reports Word Merge

Edit Provider

Providers Provider Name GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS PROVIDERS CLAIMS SCHEDULER REPORTS

A Test Provider (18830)

Workers Services Provider ID Numbers Contracts Beds Linked Providers Conditions Service Area Admin Actions

Providers Divisions EVV Activities Forms Enrollments Authorizations Notes Credentials EVV Scheduling CAP Appointments

Basic Information

Provider Name	A Test Provider	Residential Monitor	Reed, Monica
DBA (if applicable)/Facility Name		Licensing Specialist	Reed, Monica
Licensed Home licensed for capacity		Area Behavior Analyst	Reed, Monica
Active	Yes	Licensed Home/ADT# of workers	
WSC QO		Licensed Facility	Yes
External	Yes	Medicaid Provider ID	XXXX
Exclude from Selection	No	Provider EIN	XXXX

11. Update Provider demographics so that the APD Vendor No. field value is the same as the Provider iConnect ID. *Copy/paste the Provider iConnect ID into the APD Vendor No. field and then also enable the "Exclude from Selection" field* and then Select File > Save and Close Provider

APD Vendor No field - Note: User can request that the Region QA Vendor Num Edit role make any updates/changes as this field becomes read only after the initial save.

Test Region Provider (21362) 

FL APD Interface Test (Copy of PROD 3/10/23) - Work - Microsoft Edge
<https://ltssbh1.mediware.com/FLAPDInterfaceTest/Pages/Harmony.aspx?ChapterID=325&ViewTyp>



File Edit

Provider	Basic Information
Addresses	Provider Name * <input type="text" value="Test Region Provider"/>
Telephone Number(s)	DBA (if applicable)/Facility Name <input type="text"/>
	APD Vendor Number <input type="text" value="21362"/> 
	WSC QO <input type="text"/>
	Active * <input checked="" type="checkbox"/>
	Provider Type <input type="text" value="1"/>
	Exclude from Selection <input checked="" type="checkbox"/>

NOTE: Adding the APD Vendor No initiates the ID PASS access program which will automatically get the Provider access to iConnect.

The following scenarios may exist for a prospective applicant:

- If existing Provider with authorizations, but no licensed facility – would already have IDPASS access, but the promoted prospective applicant record will need to be linked to the Parent Provider Record.
- If existing Provider without authorizations – Needs IDPASS in addition to the Applicant Flag signaled.
- If Waiver Provider – already have group homes and want to open new group home – Needs the promoted prospective applicant record linked to Parent Provider
- If abandoned Provider, would need to get new IDPASS access



The Prospective Applicant will need to complete the ID PASS process and get access to iConnect.

The Region will need to follow the background screening/Clearing House process which is outside of iConnect

NEW! No Parent Record Exists – Partner with Provider Enrollment for the creation of the Placeholder Parent Provider Record

At time of promotion from the Prospective Applicant Queue, the Licensing Specialist will search for an existing parent provider record by trying alternate searches, such as the provider's last name and/or business name, etc. to ensure there is no existing parent provider record.



IMPORTANT: If a parent or facility duplicate record is created, these CANNOT be deleted. It must be closed through State Office, not deleted.

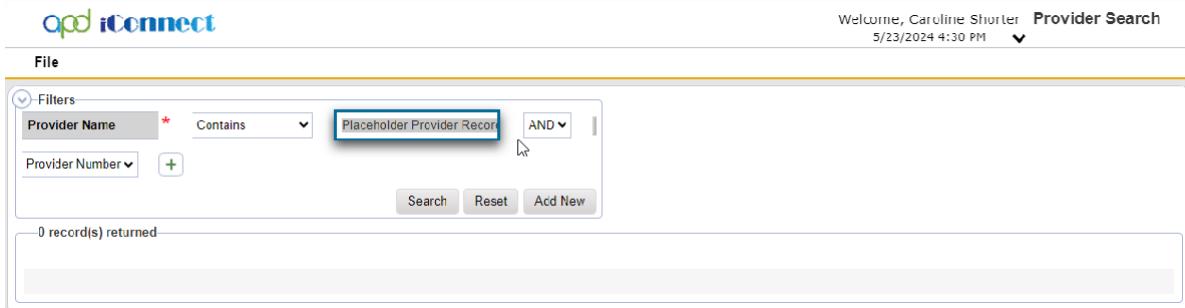
If no Parent Provider Record is located, the licensing specialist will need to partner with Provider Enrollment to have a Placeholder Parent Provider Record Created.

Once the Placeholder Parent Provider Record is created, proceed to [Link to Existing Parent Provider Record and Add Applicant License Record](#) section.

Add a Placeholder Parent Provider Record, keeping the following information in mind:

- a. *Use an iConnect ID as Medicaid ID (instructions will direct you to contact State Office to input the Medicaid ID)*
- b. *Follow standard “APD Vendor No” format*
- c. *Add a placeholder iBudget Waiver Certification record*

1. Set “Role” = Region QA Workstream Worker then click **Go**.
2. Navigate to the Providers Chapter, File > Add New Provider Search
3. Use the Filters to search for Provider Record
4. If no Parent Provider Record is found, click “Add New”



5. Update the Following Fields:

- a. Initial Division = APD
- b. APD Vendor Number = Follow standard “APD Vendor No” format (F+EIN or S+SSN)
- c. Active = Checked
- d. Exclude from Selection = Unchecked
Remember to come back and Check “Exclude from Selection” after the Placeholder Parent record has been linked to the Group Home record. Then when the provider signs a MWSA, the Exclude from Selection box should be unchecked so that the provider can be selected when WSCs attempt to add planned services for this provider.
- e. External = Checked
- f. Provider SSN = Add if known (as applicable)
- g. Medicaid Provider ID = Leave Blank (This will be filled in by State Office later in the workflow)
 - i. Once the record is initially saved, the Provider iConnect ID will display.
 - ii. Email the APD Provider Actions inbox for any Medicaid ID number edits needed. Include the following:
 - **Subject Line:** MEDICAID ID# Edit Needed
 - The iConnect ID for the Corporate (parent) record, including the Placeholder record if applicable.
 - Provider/Business Names
 - The correct Medicaid ID or Provider iConnect ID for the Placeholder record
- h. Provider EIN = Add if Known (as applicable)

File Edit

An asterisk (*) indicates a required field

Basic Information

Initial Division *	APD	Residential Monitor	Lookup	Clear
Provider Name *	Placeholder Provider Record	Licensing Specialist	Lookup	Clear
DBA (if applicable)/Facility Name		Area Behavior Analyst	Lookup	Clear
APD Vendor Number	F12345678901	Group Home/ADT # of workers		
WSC QO	No	Provider SSN	111111111	
Active *	<input checked="" type="checkbox"/>	Medicaid Provider ID		
Provider Type		Provider EIN	59-123456789	
Exclude from Selection	<input type="checkbox"/>	Licensed Facility		
Specialist/Liaison		Presumptively Institutional	<input type="checkbox"/>	
Lookup Clear				

i. File > Save Provider Record

6. A new window opens with the Division Details screen

a. Update the following fields:

i. Disposition = Open

b. File > Save and Close Division

7. Navigate to the Credentials Tab

8. File > Add Certification

a. Update the following fields:

i. Certification Type = iBudget Waiver Applicant Placeholder

ii. Effective Date = Today's date

iii. Expiration Date = Leave Blank

iv. Comment = "Placeholder Provider Record created for the purposes of a new license provider application user provisioning and access."

v. Status = Applicant Placeholder

vi. QA Workstream Worker = Provider Enrollment Specialist

File

An asterisk (*) indicates a required field

Certification Details

Credential Type *	Certification
Certification Type	iBudget Waiver Applicant Placeholder
Effective Date	05/23/2024
Expiration Date	MM/DD/YYYY
Comment	Placeholder Provider Record created for the purposes of a new license provider application user provisioning
Status	Applicant Placeholder
QA Workstream Worker	Shorter, Caroline
Lookup Clear Details	

b. File > Save and Close Certification Details

NEW! Link to Existing or Placeholder Parent Provider Record and Add Applicant License Record



Once the online application request has been vetted and promoted from the Prospective Applicant Queue, the Licensing Specialist will search for an existing parent provider record by trying alternate searches, such as the provider's last name and/or business name, etc. to see if there is existing parent provider record.

IMPORTANT: If a parent or facility duplicate record is created, these CANNOT be deleted. It must be closed through State Office, not deleted.

Once the Parent Provider Record is located, the Licensing Specialist will link the new applicant record to the existing parent provider record and then add a Placeholder Applicant License Credential to grant the Service Provider access to this new Prospective Applicant Provider Record. This Placeholder Applicant License Credential is only a temporary credential added solely for the purpose of allowing the applicant access to the promoted record and is not an actual license credential.

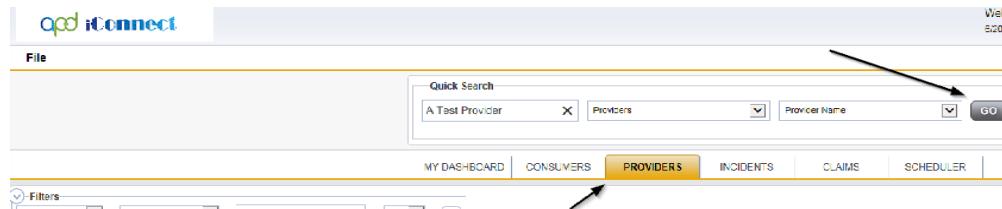
If no Parent Provider Record is located, the Licensing Specialist has partnered with Provider Enrollment to create the Placeholder Provider Record and now can link the new applicant record to the Placeholder Provider Record and add an Applicant License Credential to grant the Service Provider Access to this new Prospective Applicant Provider Record.

1. Set “Role” = Region QA Workstream Worker then click **Go**.

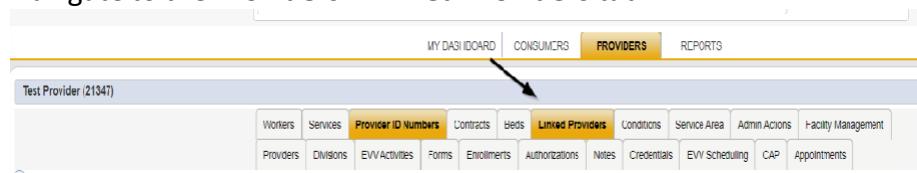
A screenshot of a software interface showing a search or selection screen. At the top, there is a label 'Role'. Below it is a dropdown menu with the option 'Region QA Workstream Worker' selected. To the right of the dropdown is a 'GO' button with a small arrow pointing towards it.

2. Navigate to the **Providers** chapter and enter the **PARENT** Provider's name in the

Quick Search filter and click **Go**.



3. Navigate to the **Providers > Linked Providers** tab



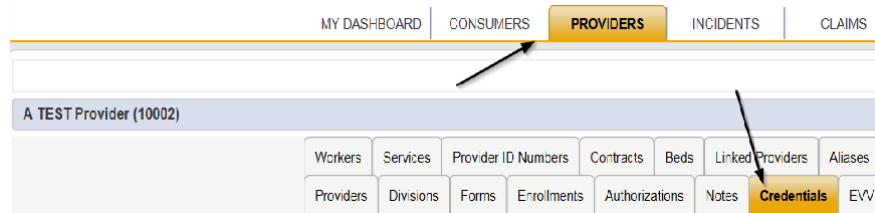
4. Select **File > Link to a Vendor**



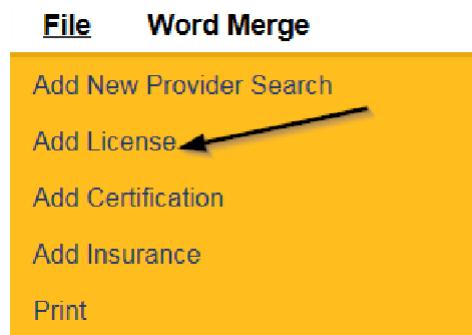
5. Update the following fields:

- Relationship = Subsidiary
- Linked Provider = Click ellipsis and search for Child Provider record (Previously Promoted Applicant Record)
- Start Date = Enter Date
- File > Save and Close the Linked Provider Record

- The Provider's record will display. Navigate to the Providers chapter and enter the **CHILD** Provider's name in the Quick Search filter and click Go.
- Navigate to the **Providers > Credentials** tab



- Select **File > Add License**



- Update the following fields:

- "License Type" = select as appropriate
 - Foster Home
 - Group Home
- License Number = Enter information – *Please note that each region has their own system for assigning license numbers, and the numbers included in the naming convention will be the Provider iConnect ID for the Promoted Application Record.*

Example: SCR-APPL-12345 where 12345 is the iConnect ID for the Promoted Application Record.

- Southern: SR-APPL-12345
- Southeast: SER-APPL-98765
- Central: CR-APPL-45645
- Northeast: NER-APPL-91919
- Suncoast: SCR-APPL-73257
- Northwest: NWR-APPL-88665

- c. "Original Date of Issuance" = Enter Date
- d. "Effective Date" = Enter Date
 - i. "Expiration Date" = Enter Date Expiration of 4 months (120 days)
Enter Date *Regional Staff may have to update the Expiration date if licensing goes beyond the originally entered expiration date.*
- e. Comment = "Placeholder License Record created for the purposes of a new license provider application user provisioning and access."
- f. "Status" = Applicant
- g. "Reason" = Initial
- h. "QA Workstream Worker" = Click Lookup on the field to add the *Licensing Specialist*.
 - i. Enter the Last Name and Click Search and then select the Name

An asterisk (*) indicates a required field

License Details

Credential Type *	License
License Type *	Group Home
License Number *	SCR-APPL-73257
Original Date of Issuance *	05/23/2024
Date of Renewal/Subsequent License	MM/DD/YYYY
Effective Date *	05/23/2024
Expiration Date *	07/31/2024
Less than One Year	
Comment	License Record created for the purposes of a new license provider application user provisioning
Status	Applicant
Reason	Initial
QA Workstream Worker	Shorter, Caroline

File 18919 Group Home Record License Details
5/23/2024 5:19 PM

The License Record will be updated when the license is approved, denied, or abandoned.

10. When finished, click **File > Save and Close License Details**

11. ***Only needed if using a Parent Record that does not have an active MWSA.** - Once the Group Home record has been linked to the Parent record, navigate to the Parent record and go to **Edit > Select Edit Provider**. Check the Exclude from Selection. Then go to **File > Save and Close Provider**

APD Vendor Number	F12345678901
WSC QO	No
Active *	<input checked="" type="checkbox"/>
Provider Type	
Exclude from Selection	<input checked="" type="checkbox"/>
Specialist/Liaison	

Lookup Clear

NEW! User Provisioning and iConnect Access



Since some applicants may not have authorizations, the ID PASS email will not be sent.

User Provisioning is required for these providers, please proceed to [Flag Applicant Providers](#).

As Needed: Reject Prospective Applicant Provider

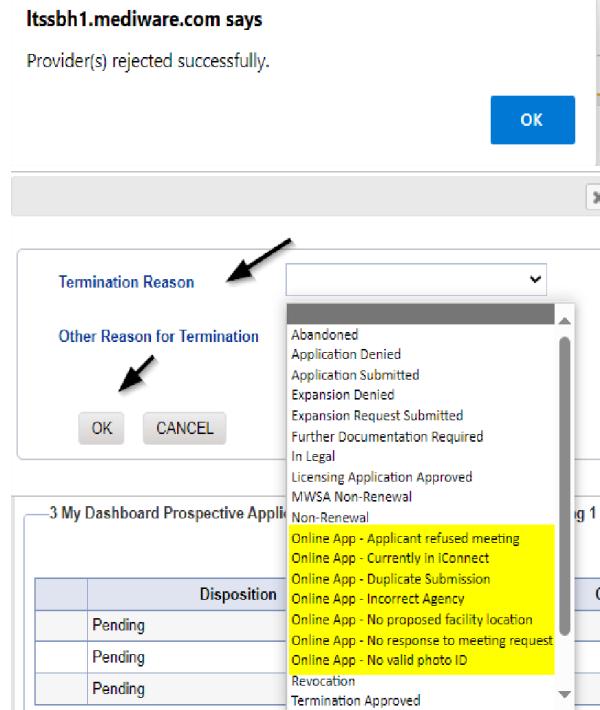


The users will be able to search on Provider Name, EIN/SSN, and Region. If a matching Provider record is found and the user decides to create a new record, they should be presented with a dialog box stating:

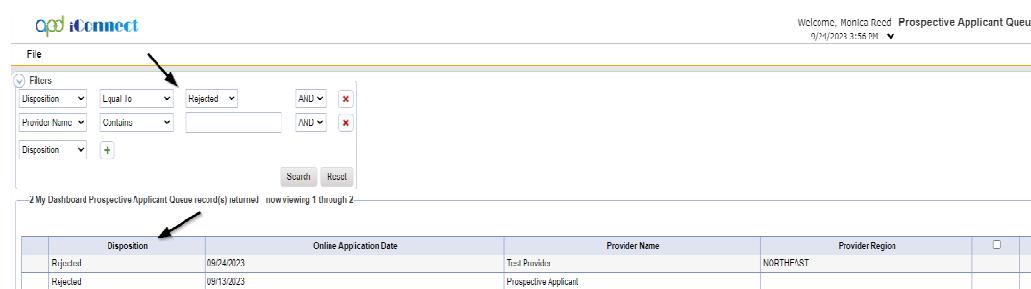
“Warning. A Provider record with a matching name and/or EIN/Tax ID Number already exists. Are you sure you want to continue?” If they click the “Yes” button, create the new Provider record. If they click the “No” button, the creation of the Provider record shall be canceled.

1. If the prospective applicant needs to be rejected due to an existing record, the Licensing Specialist will select the record via the checkbox at the end of the record and then Click **File > Reject Provider**

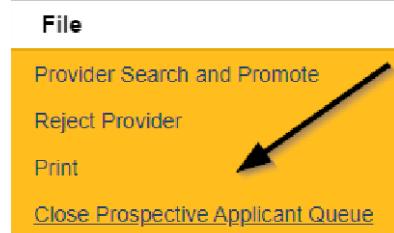
2. The Licensing Specialist will be presented with a pop-up message box for a termination reason selection. Select one of the Online App reasons as appropriate and then Click **OK**
3. The following pop-up message box will display. Click **OK**



4. The record will be changed to have a disposition of "Rejected".



5. If finished with the record, Select **File > Close Prospective Applicant Queue**



New Licensed Facility Application

Introduction

The Prospective Applicant will complete the application process by logging in to iConnect and updating their Provider record. Additional documentation will need to be provided for review of the application request.

Complete Facility Application Form



The Prospective Applicant will need to complete a new Facility Application. Once complete, they will need to print, sign, initial and notarize the form. They will then scan and save an electronic copy of the notarized form to their device.

1. Set “Role” = Service Provider then click **Go**

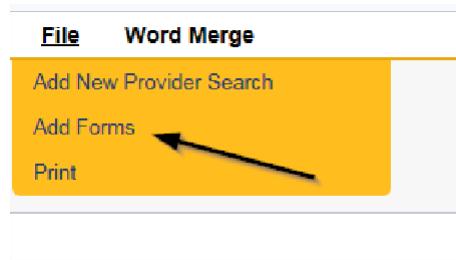
A screenshot of a web interface showing a dropdown menu labeled 'Role' with 'Service Provider' selected. A black arrow points from the text above to this dropdown. To the right is a 'GO' button.

2. Navigate to the Prospective Applicant’s Facility home record then click the **Providers > Forms** tab

A screenshot of the iConnect software interface. At the top, there's a navigation bar with 'File', 'Word Merge', 'Quick Search' (with a dropdown for 'Providers'), 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (which is highlighted in yellow), and 'INCIDENTS'. Below this, a provider record for 'A TEST Provider (10002)' is shown. On the right side of the provider record, there's a 'Filters' section and a tab bar with 'Workers', 'Services', 'Provider ID Numbers', 'Contracts', 'Logs', 'Linked', 'Forms' (which is highlighted in yellow), 'Enrollments', 'Authorizations', and 'Notes'. A black arrow points from the text above to the 'Forms' tab. Below the provider record, a table shows '31 Forms record(s) returned - now viewing 1 through 15-' with columns for 'Division' and 'Form Name'. The table data is as follows:

Division	Form Name
APU	Group Home Facility Checklist
APD	Group Home Personnel Record Review
APU	Provider Enrollment Application

3. Click **File > Add Forms**



4. Select “Please Select Type” as “Facility Application Form” from the drop-down list

Please Select Type: Facility Application Form (APD 2014-01)

Provider Assessment

Division * APD

Review * Initial

Review Date * 09/25/2023

Worker * Reed, Monica

Status * Pending

Approved By

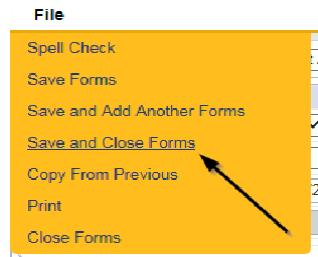
FACILITY APPLICATION FORM (APD 2014-01)

Instructions: Please ensure that all applicable parts of this form are completed legibly and in their entirety. If you have questions regarding this form or the application process, please contact your area APD office for assistance.

5. Update the following Header fields:

- "Division" = APD
- "Review" = Initial
- "Review Date" = Defaults to today's date
- Complete all fields on the Facility Application Form
- "Status" = Pending

6. When finished, click **File > Save and Close Forms**



7. Select **Word Merge > Facility Application Form**

Test Provider
Last Updated by mrsed@apd.state.fl.us
at 9/10/2023 6:25:58 PM
Forms

File Reports Word Merge

Facility Application Form (APD 2014-01)

Provider Assessment

Division * APD Worker * Reed, Monica
Review * Annual Status * Pending
Review Date * 09/12/2023 Approved By
Approved Date

FACILITY APPLICATION FORM (APD 2014-01)

8. Select **File > Print** to print the Word Merge



FACILITY APPLICATION FORM (APD 2014-01)

Instructions: Please ensure that all applicable parts of this form are completed legibly and in their entirety. If you have questions regarding this form or the application process, please contact your area APD office for assistance.

Indicate in the space below whether this an application for an initial license or an application for renewal of an existing license.

Initial Renewal



The Prospective Applicant will need to sign, initial and notarize the form. They will then scan and save an electronic copy of the notarized form to their device.

Complete Licensed Capacity Form



The Prospective Applicant will complete the Licensed Capacity form and the QA Workstream Worker will validate the information during the site visit.

1. Set “Role” = Service Provider then click **Go**

A screenshot of a user interface showing a dropdown menu labeled 'Role'. The option 'Service Provider' is selected and highlighted in blue. To the right of the dropdown is a grey 'GO' button. A black arrow points from the text above to this 'GO' button.

2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click go.

A screenshot of the OAS iConnect provider search interface. The 'PROVIDERS' tab is highlighted in yellow. Above the tab, there is a 'Quick Search' bar with the text 'A Test Provider' in the 'Provider Name' field and a 'GO' button. Below the search bar, there are several tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (which is active), 'INCIDENTS', 'CLAIMS', and 'SCHEDULER'. A black arrow points from the text above to the 'GO' button in the search bar.

3. Navigate to the **Providers > Forms** tab

A screenshot of the provider forms interface. The 'PROVIDERS' tab is highlighted in yellow. In the top navigation bar, there is a 'Forms' tab which is also highlighted in yellow. A black arrow points from the text above to this 'Forms' tab.

4. Click **File > Add Forms**

A screenshot of a dropdown menu with a yellow background. The option 'Add Forms' is highlighted with a yellow box and an arrow pointing to it from the text above. Other options in the menu include 'Add New Provider Search' and 'Print'.

5. Select “Please Select Type” as “Use for after 2014 - Calculation of License Capacity” Form from the drop-down list

Please Select Type: Use for after 2014 Calculation of License Capacity

Provider Assessment

Division: APD

Review: Initial

Review Date: 07/14/2022

Worker: Reed, Monica

Status: Draft

Approved By: [empty]

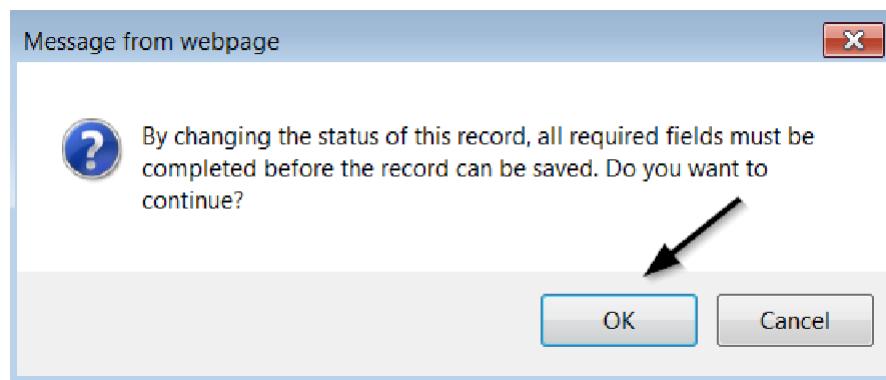
Approved Date: [empty]

Use for after 2014 - CALCULATION OF LICENSED CAPACITY

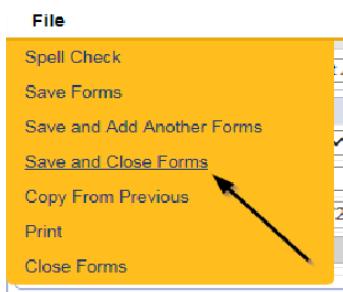
For New License Applications as of July 1, 2014

6. Update the following Header fields:

- "Division" = APD
- "Review" = Initial
- Complete all fields on the Licensed Capacity Application Form
- "Status" = Pending



7. When finished, click **File > Save and Close Forms**



Add Other Qualifying Documentation



The Prospective Applicant will add a note if there are any other qualifying documents that are required.

1. Set "Role" = Service Provider then click **Go**

Role

Service Provider

GO

2. Navigate to the **Providers > Notes** tab

File Reports

Quick Search

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCIC

A TEST Provider (10002)

Workers Services Provider ID Numbers Contracts **Notes** **Links Providers** **Aliases** **Conditions**

Providers Divisions Forms Enrolments Authorizations **Notes** Credentials DVM Scheduling

Filters Note Type Equal To AND Note Date **Notes**

Search Reset

3. Click **File > Add Notes**

File Reports

Add New Provider Search

Add Notes

Print

4. In the new Note record, update the following fields:

- a. "Division" = APD
- b. "Note Type" = Initial Application
- c. "Note Subtype" = Select a category below
 - i. *Background Screening (which could be one or more of the following)*
 1. Attestation of Good Moral Character
 2. Background Results
 3. Background Screening
 4. Law Check Form
 5. Level II Background Screening

ii. Business Information (which could be one or more of the following)

1. Articles of Incorporation
2. Financial Ability
3. Promo Materials
4. Current Board Members Names/Phone Numbers
5. Names of all controlling Entities

iii. Facility (which could be one or more of the following)

1. Facility Floor Plan
2. Fire Inspection
3. Signed Lease
4. Vehicle Registration/Insurance
5. Zoning Variance

iv. Personnel Information (which could be one or more of the following)

1. Driver's License
2. Education
3. Operator Experience
4. References
5. Resume
6. SSN

v. Policies and Procedures (which could be one or more of the following)

1. Admin Policies
2. Emergency Mgmt Plan
3. Professional Liability Insurance
4. Sexual Activity Policy

d. "Description" = Same as subtype

e. "Note" = Enter notes to include list of documents

f. "Status" = Complete

g. Click "Add Attachment" and search for the copy of the document on the user's computer. Click Upload

NOTE: Each attachment can be up to 18mb in size

h. Click the Lookup button on the "Add Note Recipient" to add the *Licensing Specialist* as the Note Recipient

i. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division *	APD
Note By *	Reed, Monica
Note Date *	09/25/2023
Note Type *	Initial Application
Note Sub-Type	Background Screening
Description	Background Screening

Note

Status *

Complete	
Date Completed	09/25/2023

Attachments

Add Attachment

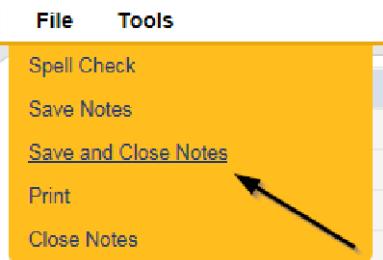
Document Description

There are no attachments to display

Note Recipients

Add Note Recipient:

5. When finished click **File > Save and Close Notes**



Application Submitted Note



The Prospective Applicant will add a note indicating the submittal of the Facility Application Form, Licensed Capacity form and all supporting documentation.

1. Set “Role” = Service Provider then click **Go**

A screenshot of a user interface showing a dropdown menu labeled 'Role'. The option 'Service Provider' is selected and highlighted in blue. To the right of the dropdown is a grey 'GO' button. A black arrow points from the text above to this 'GO' button.

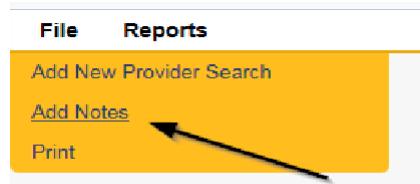
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click go.

A screenshot of the apd iConnect software interface. At the top, there is a 'Quick Search' bar with fields for 'A Test Provider', 'Providers', and 'Provider Name'. Below the search bar, a navigation bar has several tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (which is highlighted in yellow), 'INCIDENTS', 'CLAIMS', and 'SCHEDULER'. A black arrow points from the text above to the 'PROVIDERS' tab. Another black arrow points from the 'Provider Name' field in the search bar.

3. The Provider's record will display. Navigate to the **Providers > Notes** tab

A screenshot of the 'Providers > Notes' tab. At the top, there is a 'Quick Search' bar with fields for 'Providers', 'Provider Name', and 'Provider ID'. Below the search bar, a navigation bar has tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (highlighted in yellow), 'INCIDENTS', 'CLAIMS', and 'SCHEDULER'. The main area shows a provider record for 'A TEST Provider (10002)'. Below the provider information, there is a 'Notes' tab highlighted in yellow. A black arrow points from the text above to this 'Notes' tab. At the bottom of the screen, there is a 'Filters' section with dropdown menus for 'Note Type' and 'Note Date', and buttons for 'Search' and 'Reset'.

4. Click **File > Add Notes**

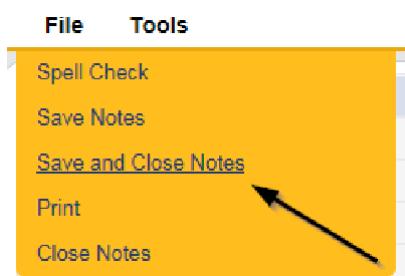


5. In the new Note record, update the following fields:

- a. "Division" = APD
- b. "Note Type" = Initial Application
- c. "Note Subtype" = Application Submitted
- d. "Description" = Application Submitted
- e. "Note" = Enter notes
- f. "Status" = Pending
- g. Click the Lookup button on the "Add Note Recipient" to add the *Licensing Specialist* as the Note Recipient
- h. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

A screenshot of the 'Notes Details' form. The form has several sections: 'Notes Details' (Division: APD, Note By: Reed, Monica, Note Date: 09/25/2023, Note Type: Initial Application, Note Sub-Type: Application Submitted, Description: Application Submitted), a large 'Note' text area with a rich text editor, 'Status' (Pending), 'Attachments' (Add Attachment), 'Document' (Description: There are no attachments to display), and 'Note Recipients' (Add Note Recipient, with a yellow box and a black arrow pointing to the 'Lookup' button). Arrows point to the 'Note Type', 'Note Sub-Type', and 'Description' fields in the 'Notes Details' section, and to the 'Note' text area.

6. When finished click **File > Save and Close Notes**

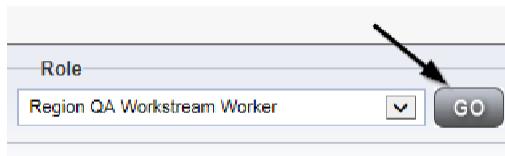


Access Ticklers



The QA Workstream Worker will login to the application and navigate to the My Dashboard > Provider > Ticklers in order to reassign and review any new ticklers.

1. Set “Role” = Region QA Workstream Worker then click **Go**.



2. Navigate to **My Dashboard > Provider > Ticklers** and click on the hyperlink for the Ticklers



3. Change the Sort Order on the Date Created column by clicking the column name once so that the most recent ticklers are displayed first.

Filters

Status	Equal To	New	AND	<input type="button" value="X"/>
Status	<input data-bbox="486 312 507 340" type="button" value="+"/>			
<input checked="" type="checkbox"/> Apply Alert Days Before Due				
<input type="button" value="Search"/> <input type="button" value="Reset"/>				

75 My Dashboard Ticklers record(s) returned - now viewing 1 through 15

Tickler Name	Provider Name	Date Created	Date Due	Date Completed	Status
Reassign to Supervisor to initiate FSFN search on licensee	Test Provider	10/10/2023	10/10/2023		New
Notify Licensing Provider Applicant of any Errors or Omissions	Test Provider	09/27/2023	10/27/2023		New

4. When the Initial Application/Application Submitted note was saved, a Workflow Wizard was triggered to remind the QA Workstream Worker to notify the Prospective Applicant of any errors or omissions within 30 calendar days



- a. Tickler – “Notify Licensing Provider Applicant of any errors or omissions”
- b. Assigned to Monitor 3 (Licensing Specialist)
- c. Due on the **30th** calendar day from the “Initial Application/Application Submitted” completed note

5. Additionally, a second tickler was triggered that needs to be reassigned to a QA Workstream Lead.



- a. Tickler – “Reassign to Supervisor to Initiate FSFN search on licensee”
- b. Assigned to the Licensing Specialist (Monitor 3) who will reassign the tickler to the QA Workstream Lead.
- c. Due immediately.

6. Click the tickler flyout menu on the “Reassign to Supervisor to Initiate FSFN search on the licensee” tickler and select Reassign.

75 My Dashboard Ticklers record(s) returned - now viewing 1 through 15

	Tickler Name	Provider Name	Date Created	Date Due	Date Completed	Status	Action
	Reassign to Supervisor to Initiate FSFN search on licensee	Test Provider	10/18/2023	10/18/2023		New	
	Notify Licensing Provider Applicant of any Errors or Omissions	Test Provider	09/27/2023	10/27/2023		New	

7. Search for and select the Supervisor. Once the supervisor's name has been selected, the tickler has been reassigned and will disappear from the QA Workstream Workers tickler list view. The QA Workstream Lead will retrieve the tickler from their My Dashboard > Provider > Ticklers when they log in to the application.

73 My Dashboard Ticklers record(s) returned - now viewing 1 through 15

	Tickler Name	Provider Name	Date Created	Date Due
	Reassign to Supervisor to Initiate FSFN search on licensee	Test Provider	10/18/2023	10/18/2023
	Notify Licensing Provider Applicant of any Errors or Omissions	Test Provider	09/27/2023	10/27/2023
	Notify Licensing Provider Applicant of any Errors or Omissions	Test Provider	09/27/2023	10/27/2023
	Review Licensing Renewal application for error or omissions	Test Provider	09/26/2023	10/26/2023
	Corrective Action Plan is due in 5 days	Test Provider	09/23/2023	10/08/2023
	Review Provider Record for Corrective Action Plan - Monthly Monitoring	Test Provider	09/23/2023	10/08/2023
	New Corrective Action Plan is Due - Licensing Renewal	Test Provider	10/18/2023	
	New Corrective Action Plan is Due - Licensing Renewal	Test Provider	10/18/2023	
	CAP Revision Due - Licensing Renewal	Test Provider	10/18/2023	
	Review Provider Record for Corrective Action Renewal	Test Provider	10/18/2023	
	Corrective Action Plan is due in 5 days	Test Provider	10/18/2023	
	Corrective Action Plan is due in 5 days	Test Provider	10/18/2023	
	Review Provider Record for Corrective Action Renewal	Test Provider	10/18/2023	
	Review Licensing Renewal application for error or omissions	Test Provider	10/18/2023	
	Review Licensing Renewal application for error or omissions	Test Provider	10/18/2023	

Search by: [Last Name] Search Text: buck

7 record(s) returned

MEMBERID	Worker	Title	User ID Active
2486	Buck, Jennifer		Yes
1230	Buck, Sarah	Support Coordinator	Yes
15942	Buck, Timothy		Yes
15347	Buckley, Silvia		Yes
21332	BUCKNER, LAWANYA		Yes
21809	Euckner, Shambra		Yes
24155	BUCKNOR, SEAN		Yes

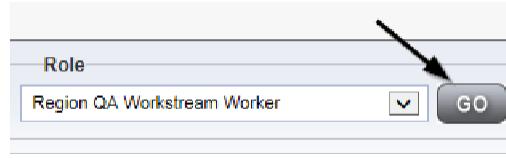
New! Abuse Record Search



Once the application is submitted, the Licensing Specialist will review the Licensing Application and all notes and attachments. Within 30 days or sooner, the Licensing Specialist will do an Abuse Record Search on the licensee(s) and note the outcome in iConnect. This will coincide with the review of the application in the next section.

The Licensing Specialist or designee will do the Abuse Record Search outside of iConnect. Once the outcome of the search is finalized, a Confidential Note will be created in the subsidiary (child) record in iConnect. The provider will not be able to view a Confidential Note type.

1. Set “Role” = Region QA Workstream Worker then click **Go**.

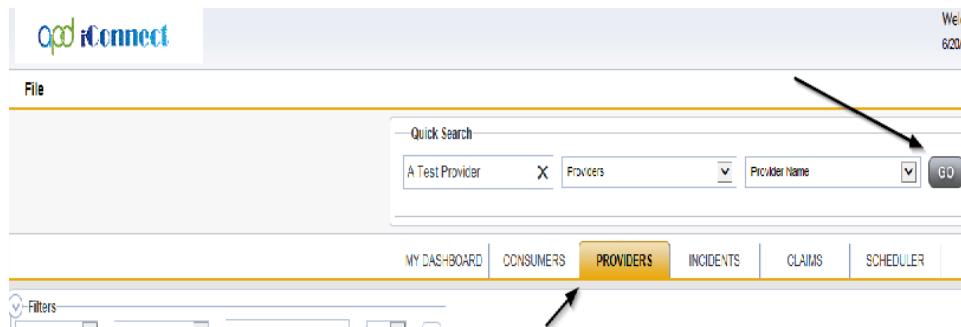


Role

Region QA Workstream Worker

GO

2. Navigate to the **Providers** chapter and enter the Provider’s Facility name in the Quick Search filter and click go.



QOD iConnect

File

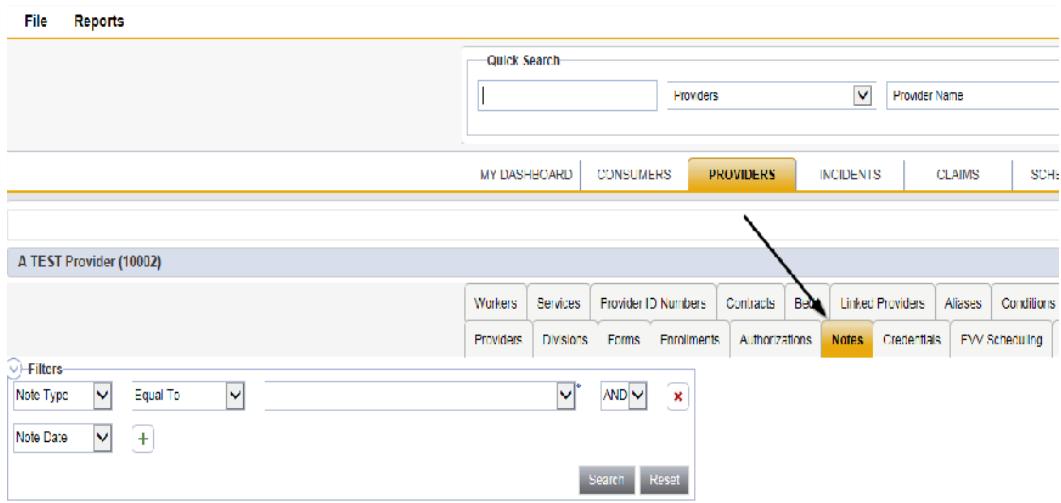
Quick Search

A Test Provider X Providers Provider Name GO

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER

Filters

3. Navigate to the **Providers > Notes** tab



File Reports

Quick Search

A TEST Provider (10002)

Workers Services Provider ID Numbers Contracts Bed Providers Linked Providers Aliases Conditions

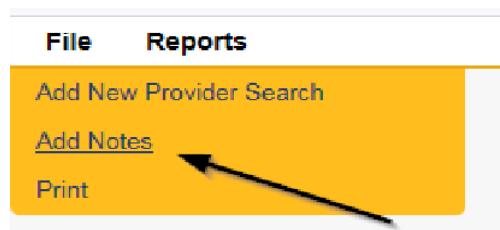
Providers Divisions Firms Enrolments Authorizations Notes Credentials FVV Scheduling

Filters

Note Type Equal To AND Note Date

Search Reset

4. Go to **File > Add Notes**



File Reports

Add New Provider Search

Add Notes

Print

5. In the new Note record, update the following fields:

- "Division" = APD
- "Note Type" = Confidential Note
- "Note Subtype" = Abuse Record Search
- "Description" = Abuse Record Search Complete
- "Note" = Enter notes
- "Status" = Update to Complete
- Click the Lookup button on the "Add Note Recipient" to add the *Supervisor* as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

File Tools

Notes Details

Division * APD

Note By * Baer, Sylvia

Note Date * 07/15/2024

Associated Form ID#

Note Type * Confidential Note

Note Sub-Type Abuse Record Search

Description Abuse Record Search

Note

Status * Complete

Date Completed 07/15/2024

Attachments

Add Attachment

Attachments Grid

Document	Description	Category	Action
There are no attachments to display			

Note Recipients

Add Note Recipient:

Note Recipients Grid

Name	Date Sent	Date Read	Status	Date Signed	Action
Baer, Sylvia	7/15/2024		Unread		<input type="button" value="Remove"/>

6. When finished click **File > Save and Close Notes**.

Complete Application



If the application is complete, the Licensing Specialist will update the Facility Application and Licensed Capacity forms to complete, then update the existing pending note.

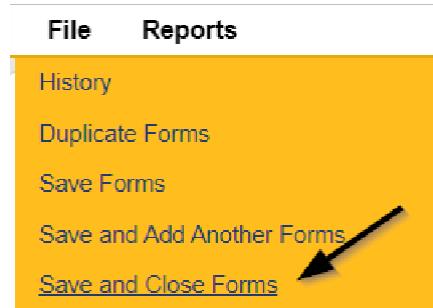
1. Set "Role" = Region QA Workstream Worker then click **Go**.

2. Navigate to the **Providers** chapter and enter the Provider's Facility name in the Quick Search filter and click go.
3. Navigate to the **Providers > Forms** tab

4. Enter the Search criteria as **Form Name = Use for after 2014 – Calculation of License Capacity** then Click **Search** and select the form via the hyperlink on the record

5. Update the Status to "**Complete**" on the Form Header and Click "**OK**" on the popup message box

6. When finished, Select **File > Save and Close Forms**



7. Enter the Search criteria as **Form Name = Facility Application Form (APD 2014-01)** then Click **Search** and select the form via the hyperlink on the record

8. Update the Status to “**Complete**” on the Form Header and Click “**OK**” on the popup message box

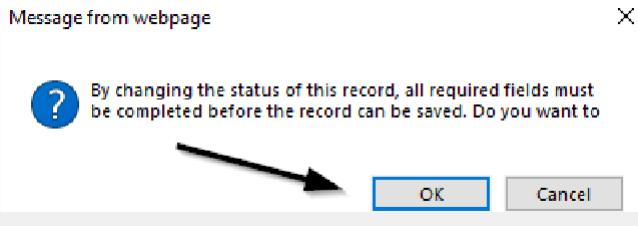
Facility Application Form (APD 2014-01)

Provider Assessment

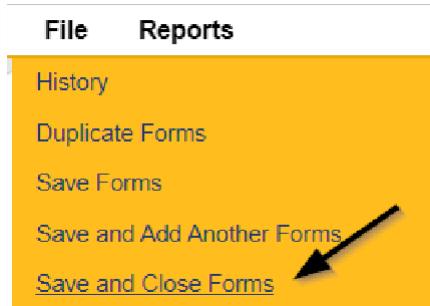
Division: APD
Review: Initial
Review Date: 08/25/2023
Approved Date: 08/25/2023

Worker: Reed, Monica
Status: Complete
Approved By: Reed, Monica

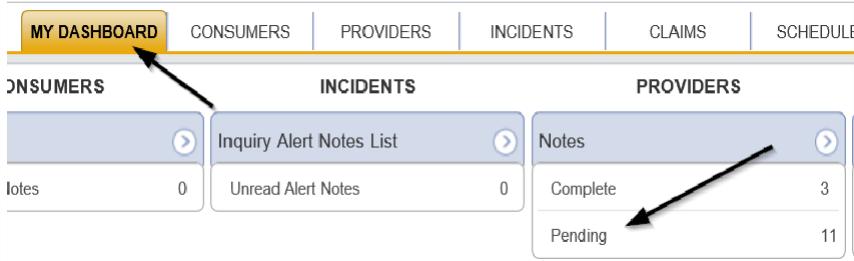
FACILITY APPLICATION FORM (APD 2014-01)



9. When finished, Select **File > Save and Close Forms**



10. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.



11. Select the Note Type = Initial Application and Description = Application Submitted and select the pending record via the hyperlink.

Filters

Status: Pending
NoteType: Initial Application

30 My Dashboard Notes record(s) returned - now viewing 1 through 15

Provider NoteType Note Date Description Author Status

Test Provider Initial Application 08/25/2023 Application Submitted Reed, Monica Pending

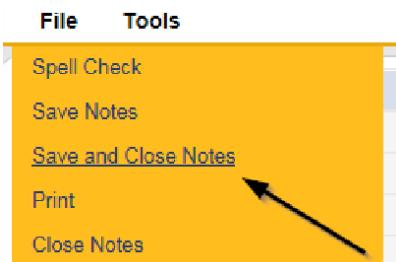
12. In the existing Note record, update the following fields:

- a. "Division" = APD
- b. "Note Type" = Leave as Initial Application
- c. "Note Subtype" = Update to Application Form Review Complete
- d. "Description" = Update to Application Form Review Complete
- e. "Note" = Enter notes
- f. "Status" = Update to Complete
- g. Click the Lookup button on the "Add Note Recipient" to add the *Prospective Applicant* as the Note Recipient
- h. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

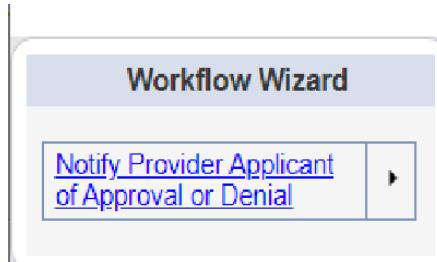
Notes Details

Division *	APD
Note By *	Reed, Monica
Note Date *	09/25/2023
Associated Form ID#	
Note Type *	Initial Application
Note Sub-Type	Application Form Review Complete
Description	Application Form Review Complete
Note	<p style="border: 1px solid black; padding: 5px;">B I U 16px A</p>
Status *	Complete
Date Completed	09/25/2023
Attachments	
Add Attachment	
Document Description	
There are no attachments to display	
Note Recipients	
Add Note Recipient:	<input type="button" value="Lookup"/> <input type="button" value="Clear"/>

13. When finished click **File > Save and Close Notes**.



14. Upon saving the note, a Workflow Wizard triggered the reminder tickler that is due in 90 calendar days



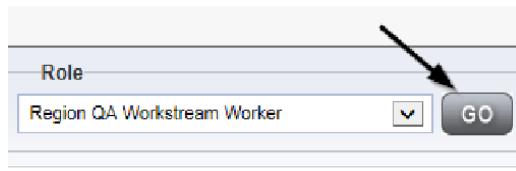
- a. Tickler - "Notify Provider Applicant of Approval or Denial"
- b. Assigned to Self (Licensing Specialist)
- c. Due on the **90th** calendar day from the "Initial Application/Application Form Review Complete" completed note

Schedule Site Visit

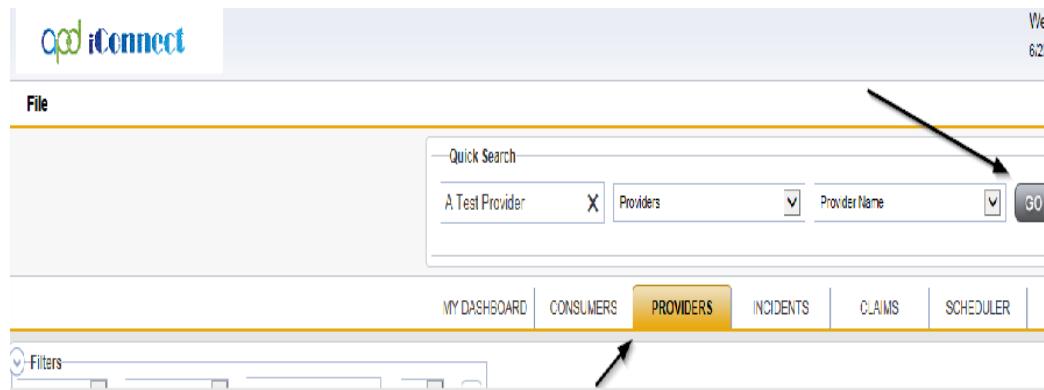


The Licensing Specialist will call the Prospective Applicant to schedule a site visit and then enter the appointment information in iConnect

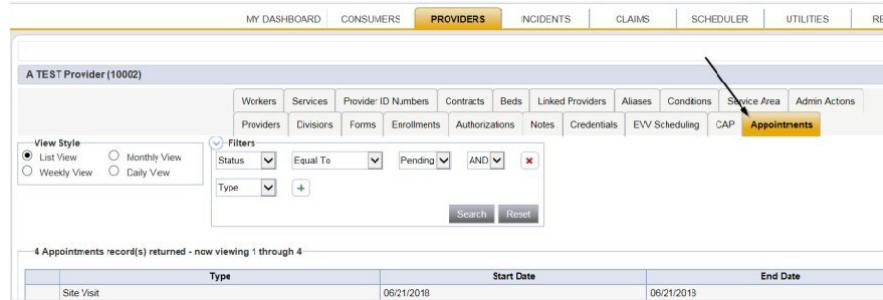
1. Set "Role" = Region QA Workstream Worker then click **Go**.



2. Navigate to the **Providers** chapter and enter the Provider's Facility name in the Quick Search filter and click go.

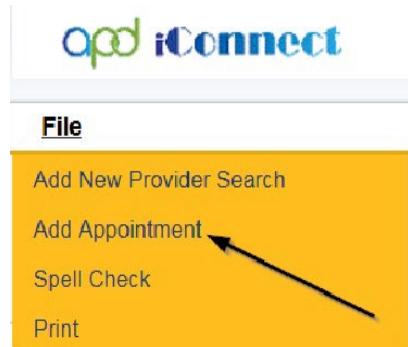


3. The Provider's record will display. Navigate to the **Providers > Appointments** tab.



The screenshot shows the APD iConnect software interface. At the top, there is a navigation bar with tabs: MY DASHBOARD, CONSUMERS, PROVIDERS (which is highlighted in yellow), INCIDENTS, CLAIMS, SCHEDULER, UTILITIES, and RE. Below the navigation bar, the title 'A TEST Provider (10002)' is displayed. Underneath the title is a toolbar with various buttons: Workers, Services, Provide ID Numbers, Contracts, Beds, Linked Providers, Aliases, Conditions, Service Area, Admin Actions, Providers, Divisions, Forms, Enrollments, Authorizations, Notes, Credentials, EVV Scheduling, CAP, and Appointments. The 'Appointments' button is highlighted with a yellow box and an arrow pointing to it. Below the toolbar, there is a 'View Style' section with 'List View' (selected) and 'Monthly View', 'Weekly View', and 'Daily View' options. A 'Filters' section allows setting 'Status' (Equal To, Pending, AND), 'Type', and includes 'Search' and 'Reset' buttons. Below these sections, a message states '4 Appointments record(s) returned - now viewing 1 through 4'. A table follows with columns: Type, Start Date, and End Date. The first row shows 'Site Visit' for 06/21/2018.

4. Click **File > Add Appointment**



The screenshot shows the APD iConnect software interface. At the top, the 'apd iConnect' logo is visible. Below it, a 'File' menu is open, showing the following options: Add New Provider Search, Add Appointment (which is highlighted with a yellow box and an arrow pointing to it), Spell Check, and Print.

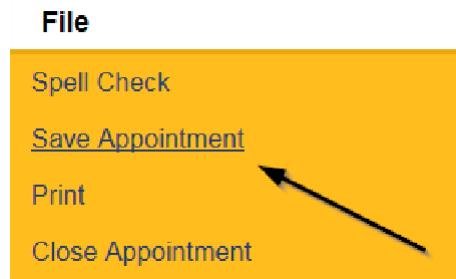
5. Update the following fields on the Appointment Details page

- a. "Division" = APD
- b. "Appointment Date" = Update date
- c. "Start Time" = Update time
- d. "Appointment End Date" = Update date
- e. "End Time" = Update time
- f. "Type" = Site Visit
- g. "Subject" = Enter subject description
- h. "Appt Summary" = Enter summary
- i. "Appt Details" = Enter details
- j. "Status" = Scheduled

Appointments

Division	APD
Appointment Date *	09/25/2023
Start Time	11 v 00 v AM v
Appointment End Date	09/25/2023
End Time	11 v 30 v AM v
Type *	Site Visit
Subject	
Status *	Scheduled

6. When finished select **File > Save Appointment**



7. Click **New Participant** on the left-hand navigation menu.



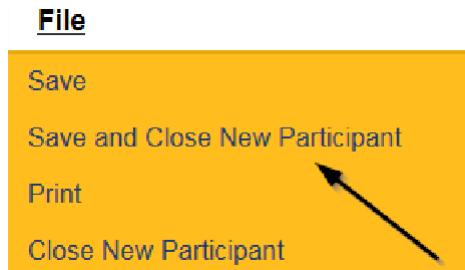
8. Set the **Non-Participants filter** list to the appropriate value in order to select the appointment participants



9. Select the appropriate Licensing Specialist and Service Provider Worker names by holding the control key down and clicking on the names and then **Click < Add**

	Non-Participants
	Filter <input type="button" value="Current Active Provider Workers ▾"/>
	Application, Harmony Buck, Jennifer Provider, Service Reed, Monica ReferralMgr, Osa Ritchie, Lesli Tarzwell, Dawn Tierney, Jacqueline Vogeler, Mandi Worker1, Elizabeth
<input type="button" value="< Add"/> <input type="button" value="<< Add All"/> <input type="button" value="Remove >"/> <input type="button" value="Remove All >>"/>	

10. When finished, Select **File > Save and Close New Participant**

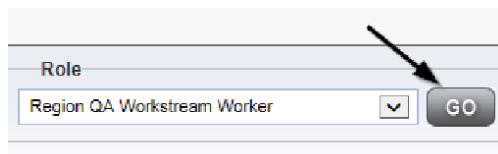


As Needed: Reschedule Site Visit Appointment



If the site visit was scheduled and needs to be done on a different date/time, the QA Workstream Worker will need to reschedule the existing appointment. This will ensure the appointment information is accurate for reporting.

1. Set “Role” = Region QA Workstream Worker then click **Go**.



2. Navigate to the **Providers** chapter and enter the Provider's Licensed Facility home name in the Quick Search filter and click go.

The screenshot shows the opd iConnect software interface. At the top, there is a navigation bar with 'File' and a user icon. Below it is a search bar with the placeholder 'Quick Search' and a dropdown menu set to 'Providers'. The search bar contains the text 'A Test Provider'. To the right of the search bar is a 'GO' button. Below the search bar is a horizontal menu bar with tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (which is highlighted in yellow), 'INCIDENTS', 'CLAIMS', 'SCHEDULER', and 'UTILITIES'. A dropdown menu labeled 'Filters' is open, showing various filter options. An arrow points from the text 'Navigate to the Providers chapter and enter the Provider's Licensed Facility home name in the Quick Search filter and click go.' to the 'GO' button.

3. The Provider's record will display. Navigate to the **Providers > Appointments** tab.

The screenshot shows the 'Appointments' tab for 'A TEST Provider'. The top navigation bar has tabs for 'Workers', 'Services', 'Provider ID Numbers', 'Contracts', 'Beds', 'Linked Providers', 'Aliases', 'Conditions', 'Service Area', 'Admin Actions', 'Providers', 'Divisions', 'EVV Activities', 'Forms', 'Enrollments', 'Authorizations', 'Notes', 'Credentials', 'EVV Scheduling', and 'CAP'. Below the navigation bar is a 'Filters' section with dropdowns for 'Status' (set to 'Equal To' and 'Pending'), 'Type' (with a '+' button), and buttons for 'Search' and 'Reset'. A message at the top says '4 Appointments record(s) returned - now viewing 1 through 4'. A table below shows four appointment records: 1. Site Visit on 06/21/2018 from 3:00 PM to 4:00 PM. An arrow points from the text 'Navigate to the Providers > Appointments tab.' to the 'Appointments' tab in the navigation bar.

4. Select the appointment record that needs to be updated via the hyperlink in the list view

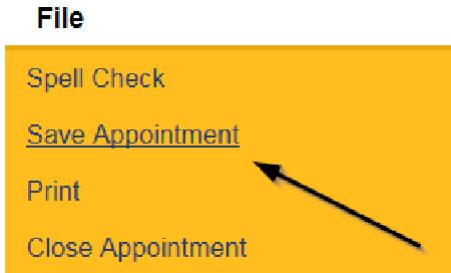
The screenshot shows the 'Appointments' tab for 'A test Provider'. The top navigation bar has tabs for 'Workers', 'Services', 'Provider ID Numbers', 'Contracts', 'Beds', 'Linked Providers', 'Aliases', 'Conditions', 'Service Area', 'Admin Actions', 'Providers', 'Divisions', 'EVV Activities', 'Forms', 'Enrollments', 'Authorizations', 'Notes', 'Credentials', 'EVV Scheduling', and 'CAP'. Below the navigation bar is a 'Filters' section with dropdowns for 'Appointment Date' and a '+' button, and buttons for 'Search' and 'Reset'. A message at the top says '4 Appointments record(s) returned - now viewing 1 through 4'. A table below shows four appointment records: 1. 06/01/2022 3:00 PM - 4:00 PM Site Visit - Appointment Scheduled for monthly site visit. 2. 01/20/2022 5:00 PM - 6:00 PM Site Visit - Monthly visit. 3. 08/02/2020 10:20:00 AM - 10:50:00 PM General - test. 4. 07/06/2018 3:50 PM - 3:45 PM Site Visit - Site Visit Licencia Renovada. An arrow points from the text 'Select the appointment record that needs to be updated via the hyperlink in the list view' to the first appointment record in the table.

5. Update the following field on the Appointment Details page

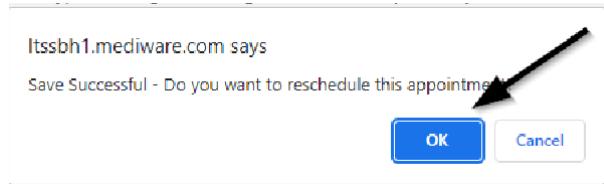
- a. "Status" = Update to Rescheduled

The screenshot shows the apd iConnect software interface. The main title is 'apd iConnect'. On the left, there's a sidebar with 'File', 'Appointment' (which is highlighted in orange), 'Participants List', 'NODC', and 'New Participant'. The main content area is titled 'Appointments'. It contains fields for 'DIVISION' (set to 'APD'), 'Appointment Date' (01/20/2022), 'Start Time' (08:00 AM), 'Appointment End Date' (01/20/2022), 'End Time' (06:00 PM), 'Type' (Site Visit), 'Subject' (Monthly visit), 'Appt.Summary (non-HIPAA Data)' (summary), 'Appt.Detail(HIPAA Data)' (details), and 'Status' (Rescheduled). A black arrow points to the 'Status' dropdown.

6. When finished select **File > Save Appointment**



7. A prompt will appear that asks, "Do you want to reschedule this appointment?"



8. Click OK to reschedule the appointment. The appointment page opens, showing some data from the previous appointment.

9. Update the Appointment date and time information for the new appointment.

10. Update the status from Pending to Scheduled, if appropriate.

apd iConnect

File

Appointment	Appointments
Participants List	Division <input type="button" value="APD"/>
Notes	Appointment Date * <input type="text" value="08/24/2023"/> <input type="text" value="07/19/2023"/>
New Participant	Start Time <input type="button" value="03 00 PM"/>
	Appointment End Date <input type="text" value="08/24/2023"/> <input type="text" value="07/19/2023"/>
	End Time <input type="button" value="04 00 PM"/>
	Type * <input type="button" value="Site Visit"/>
	Subject <input type="text" value="Site Visit for Service Level Designation
Had to reschedule due to conflict with appointment time"/>
	Appt. Summary (non-HIPAA Data) <input type="text" value="summary"/>
	Appt. Details(HIPAA Data) <input type="text"/>
	Status * <input type="button" value="Scheduled"/>

11. Click **File > Save Appointment**. Both the original and reschedule appointments are listed in the Appointments tab detail view.
12. The rescheduled appointments detail page will now show the date of the original appointment next to the new Appointment Date and Appointment End date fields.

apd iConnect

A Test Provider **Appointment**
Last Updated by miread@apdcares.org
at 6/23/2022 1:20:58 PM

File

Appointment	Appointments
Participants List	Division <input type="button" value="APD"/>
Notes	Appointment Date * <input type="text" value="06/24/2022"/> <input type="text" value="01/20/2022"/>
New Participant	Start Time <input type="button" value="02 30 PM"/>
	Appointment End Date <input type="text" value="06/24/2022"/> <input type="text" value="01/20/2022"/>
	End Time <input type="button" value="03 15 PM"/>
	Type * <input type="button" value="Site Visit"/>
	Subject <input type="text" value="had to reschedule due to conflict with appointment time"/>
	Appt. Summary (non-HIPAA Data) <input type="text" value="summary"/>
	Appt. Details(HIPAA Data) <input type="text" value="details"/>
	Status * <input type="button" value="Pending"/>

Complete Site Visit

The Licensing Specialist can print out the applicable checklists prior to the site visit if they do not have a laptop/tablet. If they have a laptop/tablet, the forms can be completed in iConnect while conducting the site visit.



The list of applicable checklists are as follows:

Foster Care Facility Checklist

Foster Care Facility Client Checklist

Foster Care Facility Personnel Record Review

Group Home Client Checklist

- Group Home Facility Checklist*
- Group Home Personnel Record Review*
- Res. Hab. Center Checklist*
- Res. Hab. Client Checklist*
- Res. Hab. Personnel Record Review*

Complete Appointment



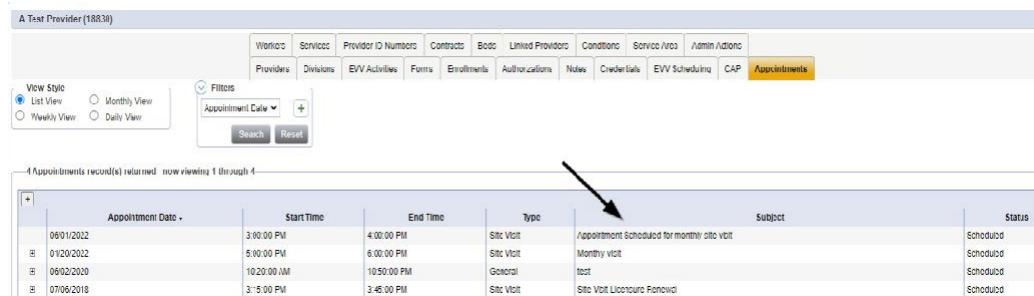
The QA Workstream Worker will update the appointment in iConnect after the site visit is completed.

1. Set "Role" = Region QA Workstream Worker then click **Go**.

2. Navigate to the **Providers** chapter and enter the Provider's Facility name in the Quick Search filter and click go.

3. The Provider's record will display. Navigate to the **Providers > Appointments** tab.

4. Select the appointment record that needs to be updated via the hyperlink in the list view

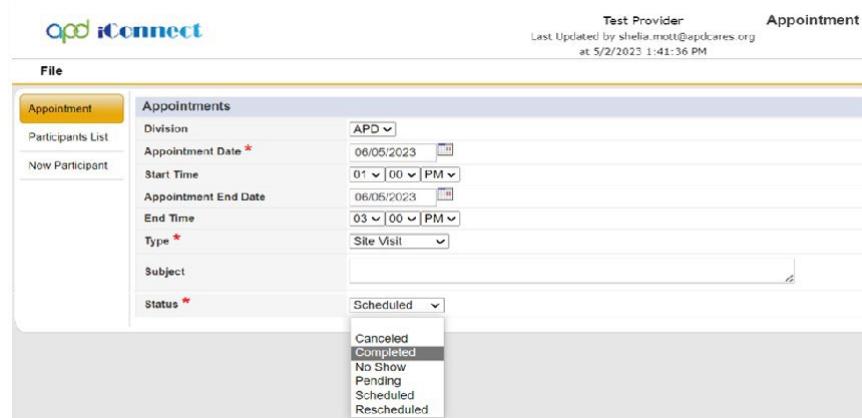


	Appointment Date	Start Time	End Time	Type	Subject	Status
B	06/01/2022	3:00:00 PM	4:00:00 PM	Site Visit	Appointment Scheduled for month/ site visit	Scheduled
B	01/20/2022	5:00:00 PM	6:00:00 PM	Site Visit	Monthly Visit	Scheduled
B	06/02/2020	10:20:00 AM	10:50:00 PM	General	test	Scheduled
B	07/06/2018	3:15:00 PM	3:45:00 PM	Site Visit	Site Visit License Renewal	Scheduled

5. Update the following field on the Appointment Details page

a. "Status" =

- Update to Completed if the site visit was completed.
- Update to Cancelled if the site visit was cancelled but not rescheduled.
- Update to No Show if the Licensing Specialist attempted to make the site visit but the contact person was not available. A new site visit will need to be scheduled.



Test Provider Appointment
Last Updated by shelbie.mott@apdcare.org
at 5/2/2023 1:41:36 PM

File

Appointment

Appointments

Division: APD

Appointment Date: 06/05/2023

Start Time: 01:00 PM

Appointment End Date: 06/05/2023

End Time: 03:00 PM

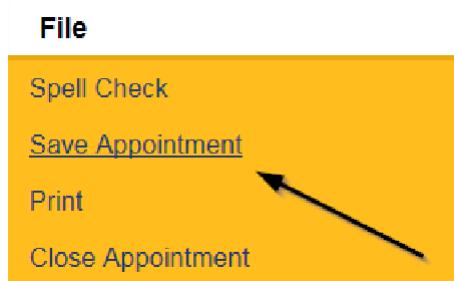
Type: Site Visit

Subject: Site Visit License Renewal

Status: Scheduled

Canceled
Completed
No Show
Pending
Scheduled
Rescheduled

6. When finished select **File > Save Appointment**



7. From the **File** menu, select **Close Appointment**.

Complete Checklists



If the site visit checklists were documented manually, the Licensing Specialist will need to enter the checklists into iConnect.

1. Set “Role” = Region QA Workstream Worker then click **Go**.

Role

Region QA Workstream Worker

GO

2. Navigate to the **Providers** chapter and enter the Provider’s Facility name in the Quick Search filter and click **Go**.

Quick Search

A Test Provider

Providers

Provider Name

GO

File

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER

Filters

3. The Provider’s record will display. Navigate to the **Providers > Forms** tab

Quick Search

Providers

GO

File Word Merge

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS

A TEST Provider (10002)

Workers Services Provider ID Numbers Contracts Bds Linked F

Providers Divisions Forms Enrollments Authorizations Notes

Filters

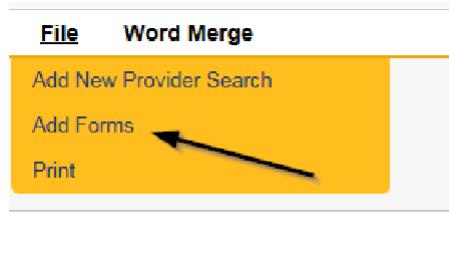
Status Equal To Draft AND

Division [+]

31 Form record(s) returned - now viewing 1 through 15

Division	Form Name
APD	Group Home Facility Checklist
AIU	Group Home Personnel Record Review
APD	Provider Enrollment Application

4. Click **File > Add Forms**

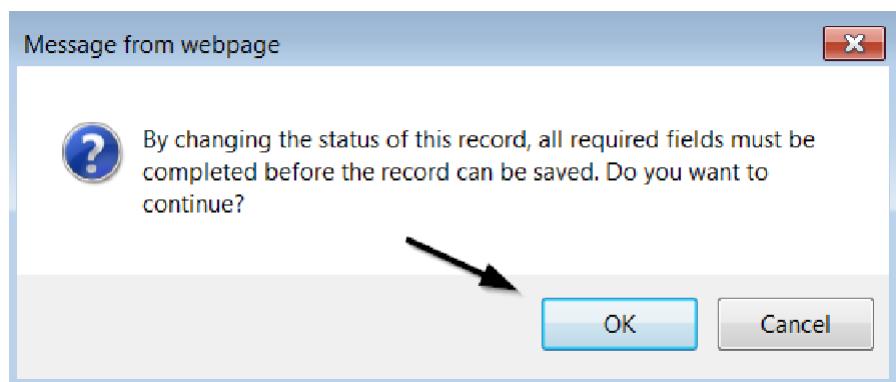


5. Select the appropriate checklist from the drop-down list

Please Select Type	
Provider Assessment	Application Package Checklist
Division	Auth for Transportation of Alternative Transportation
Review	Calculation of License Capacity
Review Date	Calculation of License Capacity: New License Apply
Approved Date	Facility Application Form (APD 2014-01)
	Foster Care Facility Client Checklist
	Foster Care Facility Personnel Record Review
	Group Home Facility Checklist
	Group Home Personnel Record Review
	Individualized Rate Request: Rates Elig Worksheet
	Online Application Request
	Provider Agency Action Request Form (PAPR)
	Provider Application for Information
	Provider Critical Incident Preliminary Alert
	Provider Enrollment Application
	Provider Enrollment Application (Resident)
	Request and Disposition of Complaints Against Prov.
	Res. Hab. Center Checklist
	Res. Hab. Person Record Review
	Res. Hab. Person Record Review
	Residential Monitoring Checklist

6. Update the following Header fields:

- "Division" = APD
- "Review" = select as appropriate
- Complete all fields on the Checklist Form
- "Status" = Complete (only set to complete once all information has been entered and won't need to be changed)
- Select **OK** on the pop-up message box confirming the complete status



- When finished, click **File > Save and Close Forms**



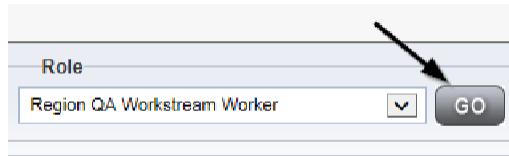
Repeat all steps as necessary for each checklist

Complete Application Package Checklist

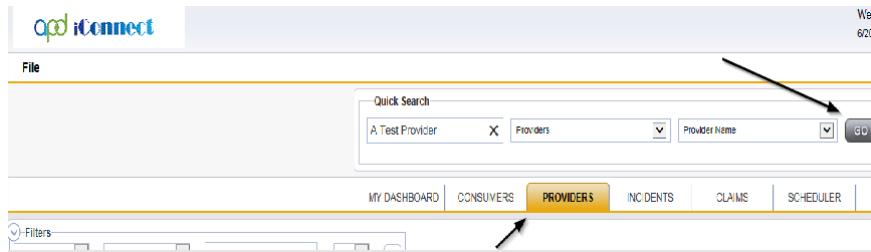


The Licensing Specialist will generate the Application Package Checklist and proceed with the Approval Process.

1. Set “Role” = Region QA Workstream Worker then click **Go**.



2. Navigate to the **Providers** chapter and enter the Provider’s Facility name in the Quick Search filter and click **GO**



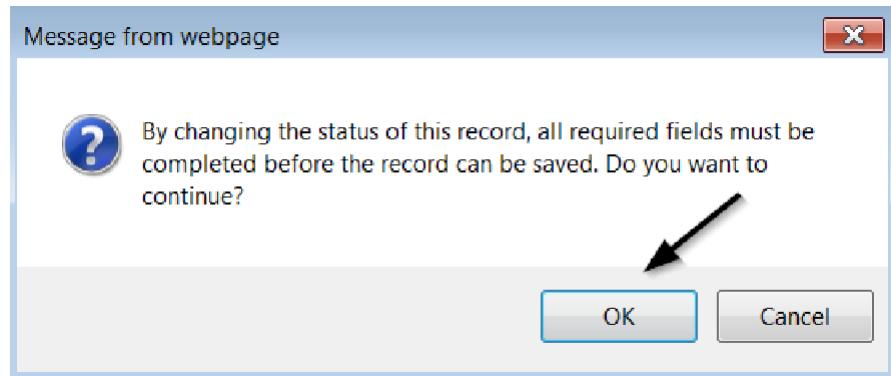
3. Navigate to the **Providers > Forms** tab

4. Click **File > Add Forms**

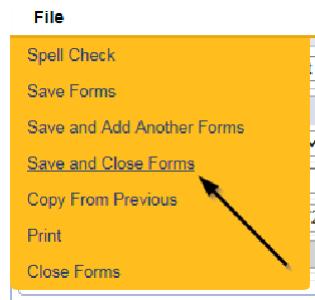
5. Select “Please Select Type” as “Application Package Checklist” from the drop-down list

6. Update the following Header fields:

- "Division" = APD
- "Review" = Initial
- Complete all fields on the Application Package Checklist Form
- "Status" = Complete (click **OK** on the pop-up message)



7. When finished, click **File > Save and Close Forms**

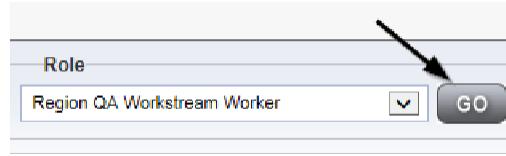


Site Visit No Violations Note

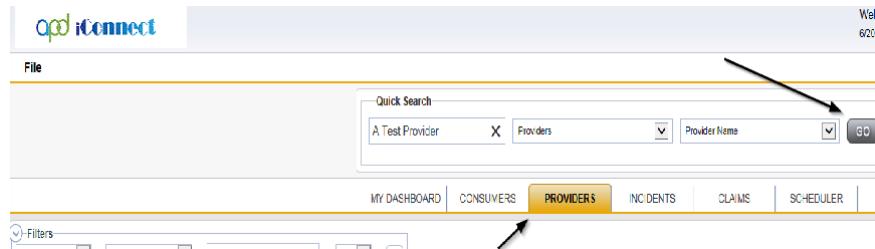


The Licensing Specialist will enter a Site Visit Note when the site visit is complete with no issues or deficiencies. Proceed to [Site Visit Complete Note – Issues](#) if violations have been identified.

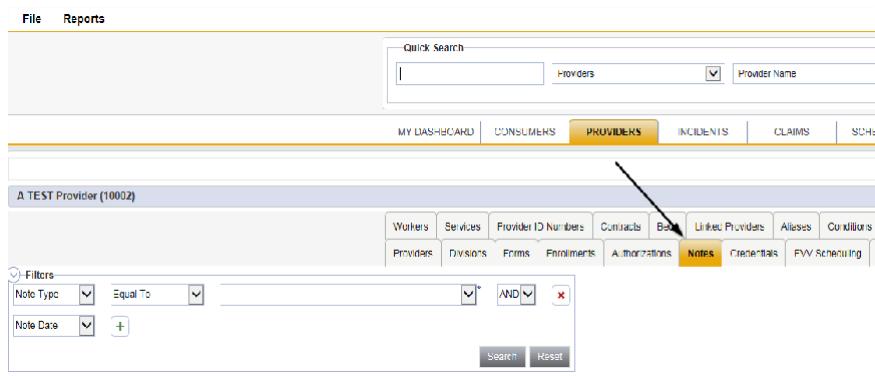
1. Set “Role” = Region QA Workstream Worker then click **Go**.



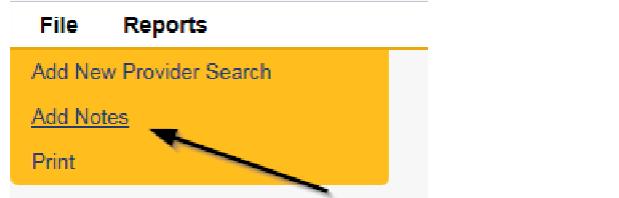
2. Navigate to the **Providers** chapter and enter the Provider’s Facility name in the Quick Search filter and click **GO**



3. The Provider's record will display. Navigate to the **Providers > Notes** tab



4. Click **File > Add Notes**



5. In the new Note record, update the following fields:

- "Division" = APD
- "Note Type" = Initial Application
- "Note Subtype" = Site Visit Complete with no issues or deficiencies
- "Description" = Site Visit Complete with no issues or deficiencies
- "Note" = Enter notes
- "Status" = Complete
- Click the Lookup button on the "Add Note Recipient" to add the **Prospective Applicant** as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 09/25/2023

Associated Form ID#

Note Type * (with arrow pointing to it)

Note Sub-Type (with arrow pointing to it)

Description (with arrow pointing to it)

Note (with arrow pointing to it)

Status * Complete

Date Completed 09/25/2023

Attachments

Add Attachment

Document Description

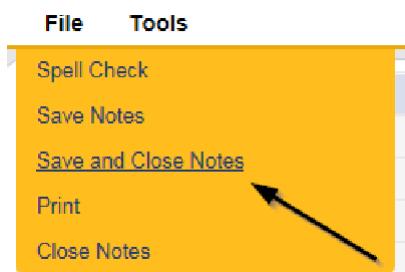
There are no attachments to display

Note Recipients

Add Note Recipient: (with arrow pointing to it)

Lookup Clear

6. When finished click **File > Save and Close Notes**



Supervisor Review



The Licensing Specialist will send a note to the Licensing Supervisor to advise them to do a review of the checklists and any other documentation.

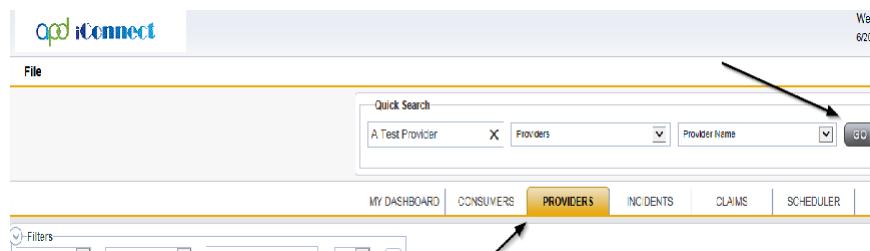
1. Set “Role” = Region QA Workstream Worker then click **Go**.

Role

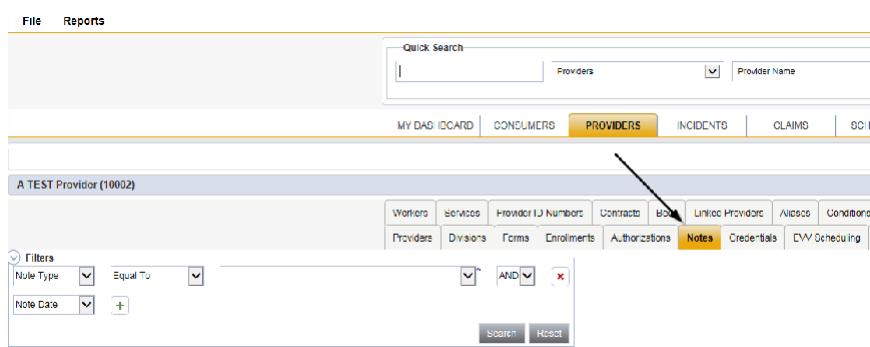
Region QA Workstream Worker

GO

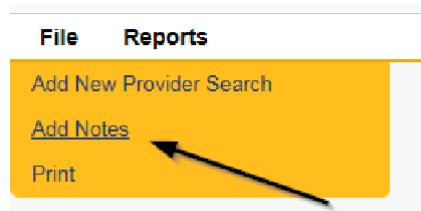
2. Navigate to the **Providers** chapter and enter the Provider's Facility name in the Quick Search filter and click **GO**



3. The Provider's record will display. Navigate to the **Providers > Notes** tab



4. Click **File > Add Notes**



5. In the new Note record, update the following fields:

- "Division" = APD
- "Note Type" = Initial Application/Supervisor Review
- "Description" = Enter description if applicable
- "Note" = Enter notes
- "Status" = Pending
- Click the Lookup button on the "Add Note Recipient" to add the *Licensing Supervisor* as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 09/25/2023

Associated Form ID#

Note Type * Initial Application/Supervisor Review

Note Sub-Type

Description

Note

Status * Pending

Date Completed

Attachments

Add Attachment

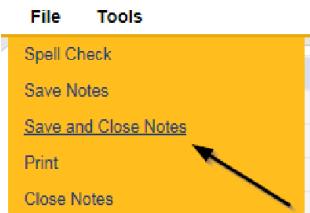
Document Description

There are no attachments to display

Note Recipients

Add Note Recipient:

6. When finished click **File > Save and Close Notes**



Supervisor Approval



The Licensing Supervisor will review the application, add a note for the approval and send to the ROM for review. If additional actions are needed, proceed to [Further Documentation Required](#) or [Supervisor Denial](#).

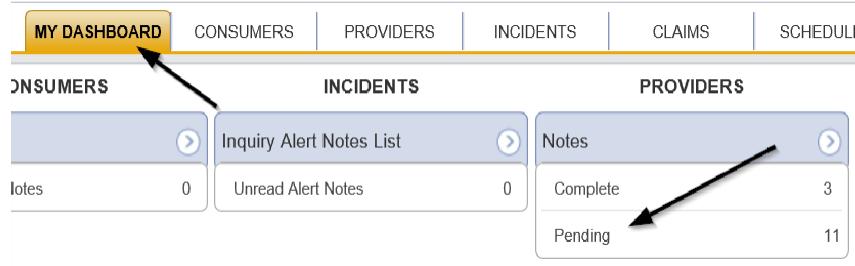
1. Set “Role” = Region QA Workstream Worker/Lead then click **Go**.

Role

Region QA Workstream Lead

GO

2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.



3. Select the **Note Type = Initial Application/Supervisor Review** and select the pending record via the hyperlink.



4. In the existing Note record, update the following fields:

- "Associated Form ID#" = Enter Form ID# if applicable
- "Note Type" = Update to Initial Application/Supervisor Approval
- "Description" = Enter description
- "Note" = Enter Notes
- "Status" = Update to Complete
- Click the Lookup button on the "Add Note Recipient" to add the **Licensing Specialist** as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note.
- Click the Lookup button on the "Add Note Recipient" to add the **ROM** as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note.

Notes Details

Division *	APD
Note By *	Reed, Monica
Note Date *	09/25/2023
Associated Form ID#	
Note Type *	Initial Application/Supervisor Approval
Note Sub-Type	
Description	

Note

New Text

B I U 16px A

Enter approval notes

Append Text to Note

Status *

Date Completed

Complete

09/25/2023

Attachments

Add Attachment

Document Description

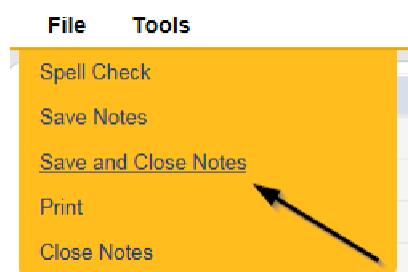
There are no attachments to display

Note Recipients

Add Note Recipient

Lookup Clear

5. When finished click **File > Save and Close Notes**



6. Select **File > Close Notes**



UPDATED: Edit License Information



The Licensing Specialist will be notified of the Supervisor Approval from the Initial Application/Supervisor Approval note on My Dashboard > Provider > Notes. This note serves as notification to add the license information to the provider record. The license information needs to be added before the ROM Review begins.

1. Set “Role” = Region QA Workstream Worker then click **Go**.

A screenshot of a search interface. At the top, there is a label 'Role' followed by a dropdown menu containing the text 'Region QA Workstream Worker'. To the right of the dropdown is a grey 'GO' button. A black arrow points from the text in the first list item to this 'GO' button.

2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click **Go**.

A screenshot of the aqd iConnect software interface. At the top, there is a 'File' menu and a 'Quick Search' bar containing three dropdown menus: 'A Test Provider', 'Providers', and 'Provider Name', followed by a 'GO' button. Below the search bar, there is a navigation bar with tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (which is highlighted in yellow), 'INCIDENTS', 'CLAIMS', and 'SCHEDULER'. A black arrow points from the text in the second list item to the 'GO' button in the search bar.

3. The Provider's record will display. Navigate to the **Providers > Credentials** tab

A screenshot of the 'PROVIDERS' tab in the aqd iConnect software. At the top, there is a navigation bar with tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (highlighted in yellow), 'INCIDENTS', and 'CLAIMS'. Below the navigation bar, there is a search bar with the text 'A TEST Provider (10002)'. Underneath the search bar, there is a table with several tabs: 'Workers', 'Services', 'Provider ID Numbers', 'Contracts', 'Beds', 'Linked Providers', 'Aliases', 'Providers', 'Divisions', 'Forms', 'Enrollments', 'Authorizations', 'Notes', 'Credentials' (highlighted in yellow), and 'EVV'. A black arrow points from the text in the third list item to the 'Credentials' tab in the table.

4. Select the Applicant License Record.

18919 Group Home Record
Last Updated by caroline.shorter@apdcare.org
at 10/26/2023 5:28:19 AM

Credentials | Sign Out | Role: Region QA Workstream Worker | GO

File Word Merge

18919 Group Home Record (29083)

Workers Services Provider ID Numbers Contracts Beds Linked Providers Conditions Service Area Admin Actions Facility Management

Providers Divisions EVV Activities Forms Enrollments Authorizations Notes **Credentials** EVV Scheduling CAP Appointments

Filters: Credential + Search Reset

3 Providers Credentials record(s) returned - now viewing 1 through 3

Credential	Type	Credential Number	Effective Date	Expiration Date	License Duration	Status
License	Group Home	SCR-APPL-73257	05/23/2024	06/05/2024		Applicant

5. Update the following fields:

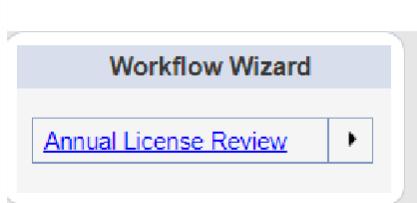
- "License Type" = select as appropriate
 - Foster Home
 - Group Home
- License Number = Enter information – *Please note that each region has their own system for assigning license numbers*

IMPORTANT!! Update the temporary placeholder license credential number with the real license number assigned by the region and update the effective and expiration dates.

- "Original Date of Issuance" = Enter Date
- "Effective Date" = Enter Date
- "Expiration Date" = Enter Date
- "Comment" = Enter comments if applicable
- "Status" = Active
- "Reason" = Initial
- "QA Workstream Worker" = Click Lookup button on the field to add the *Licensing Specialist*.
- Enter the Last Name and Click Search and then select the Name

License Details	
Credential Type *	License
License Type *	<input type="text" value="Foster Home"/> *
License Number *	<input type="text" value="FH123456"/>
Original Date of Issuance *	<input type="text" value="09/01/2023"/> *
Date of Renewal/Subsequent License	<input type="text"/>
Effective Date *	<input type="text" value="09/01/2023"/> *
Expiration Date *	<input type="text" value="09/30/2024"/> *
Less than One Year	<input type="checkbox"/>
Comment	<input type="text"/>
Status	<input type="text" value="Active"/> *
Reason	<input type="text" value="Initial"/> *
QA Workstream Worker	<input type="text" value="Reed, Monica"/> <input type="button" value="Lookup"/> <input type="button" value="Clear"/> <input type="button" value="Details"/>

6. When finished, click **File > Save and Close License Details**
7. Upon saving the license record, a Workflow Wizard triggered the reminder tickler that is due in 365 calendar days. It will be retrieved from **My Dashboard > Provider > Ticklers**.



- a. Tickler - "Annual License Review"
- b. Assigned to Self
- c. Due on the **90th** calendar day before the License expiration date for license types of Foster Home and/or Group Home

ROM Review

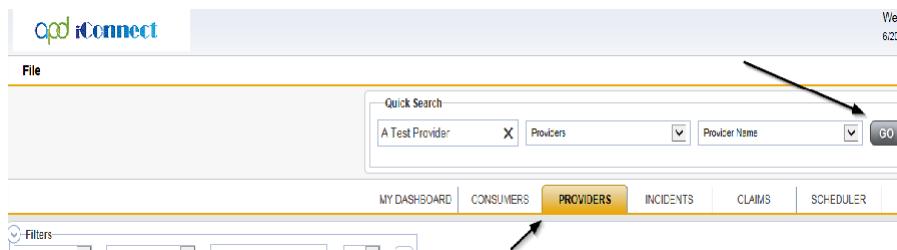


The ROM/Designee will receive notification of the Supervisor Approval or the Supervisor Denial via a note on My Dashboard. The ROM will need to review all checklists and notes. If approving, they will then print out the License Certificate. The Licensing Specialist will have added the license information to the provider record before the ROM prints the License Certificate.

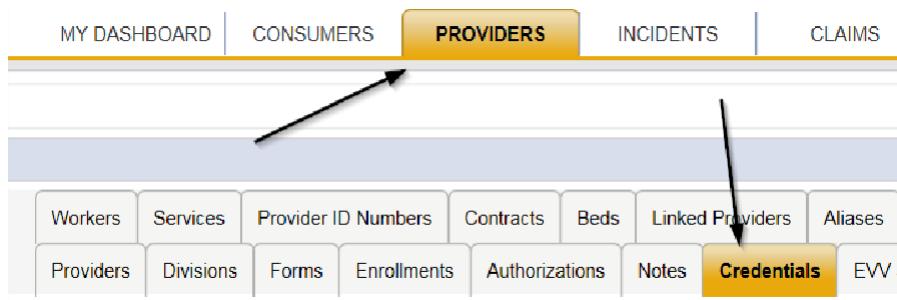
1. Set “Role” = ROM/Deputy ROM then click **Go**.



2. Navigate to the **Providers** chapter and enter the Provider’s Facility home name in the Quick Search filter and click **Go**.



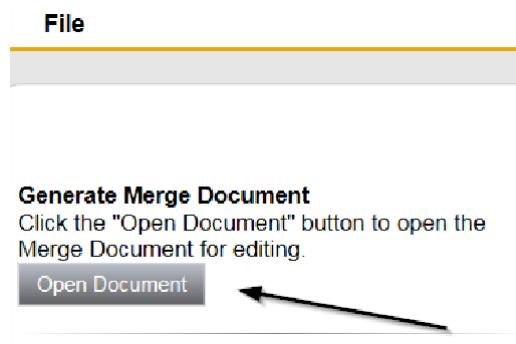
3. The Provider’s record will display. Navigate to the **Providers > Credentials** tab



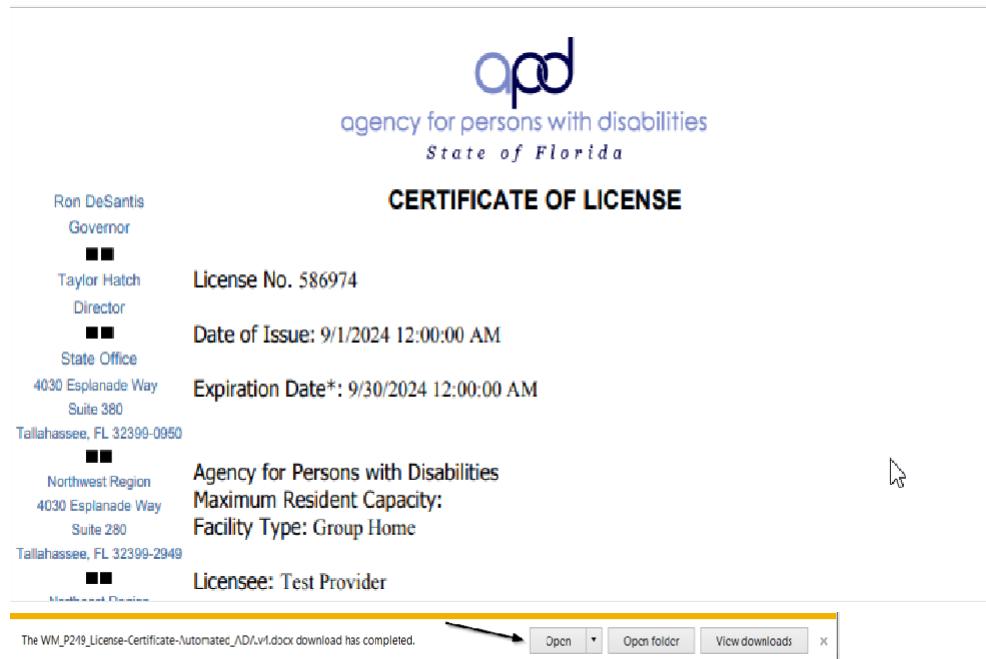
4. Select Word Merge > License Certificate Automated



5. Select **Open Document** to open the Word Merge document for editing and complete the



6. Save the Word Merge Document to the device by clicking the **Save** button and then **Open**



7. **Edit** the Word Merge Document as necessary
8. When finished, Click **File > Print** to print the updated Word Merge and then **File > Save, File > Close**
9. Select **File > Close** to close the Word Merge in iConnect





The ROM/Designee will then sign, scan and save the License Certificate to their device.

ROM Approval



The ROM will attach the hardcopy of the License Certificate into a new note. If additional actions are needed proceed to [Further Documentation Required](#) or [ROM Denial](#).

NOTE: An electronic signature will not be accepted on the License Certificate. The ROM will need to sign the hard copy and send it via interoffice mail to the Licensing Specialist.

1. Set “Role” = ROM/Deputy ROM then click **Go**

2. Navigate to the **Providers** chapter and enter the Provider's Facility name in the Quick Search filter and click **Go**.

3. The Provider's record will display. Navigate to the **Providers > Notes** tab

4. Click **File > Add Notes**



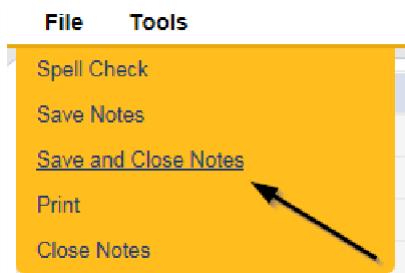
5. In the new Note record, update the following fields:

- "Division" = APD
- "Associated Form ID#" – Enter Form ID if applicable
- "Note Type" = Initial Application/ROM Approval
- "Description" = Initial Application/ROM Approval
- "Note" = Enter notes
- "Status" = Complete
- Click "Add Attachment" and search for the copy of the signed License Certificate on the user's device. Click Upload
- Click the Lookup button on the "Add Note Recipient" to add the *Licensing Specialist* as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

The screenshot shows the 'Notes Details' form with the following fields highlighted:

- Division:** APD (highlighted with an arrow)
- Note By:** Read, Monica
- Note Date:** 09/25/2023
- Associated Form ID#:** (highlighted with an arrow)
- Note Type:** Initial Application/ROM Approval (highlighted with an arrow)
- Note Sub-Type:** (highlighted with an arrow)
- Description:** (highlighted with an arrow)
- Note:** (highlighted with an arrow)
- New Text:** (highlighted with an arrow)
 - Text area: Enter approval notes
 - Buttons: B, I, U, 16px, A, Append Text to Note
- Status:** Complete (highlighted with an arrow)
- Date Completed:** 09/25/2023
- Attachments:** (highlighted with an arrow)
 - Buttons: Add Attachment
- Document:** There are no attachments to display
- Note Recipients:** (highlighted with an arrow)
 - Text input: Add Note Recipient
 - Buttons: Lookup, Clear

6. When finished click **File > Save and Close Notes**



Signed License Certificate Note



The Licensing Specialist will receive notification of the ROM Approval note on My Dashboard. They will also receive the signed hard copy of the License Certificate from the ROM/Designee. They will then generate and print the Cover Letter and add a new note to advise the Service Provider and Agency Clerk.

1. Set “Role” = Region QA Workstream Worker then click **Go**.

Role

Region QA Workstream Worker

GO

2. Navigate to the **Providers** chapter and enter the Provider’s Facility name in the Quick Search filter and click **Go**.

apd iConnect

File

Quick Search

A Test Provider

Providers

Provider Name

GO

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULER

Filters

3. The Provider’s record will display. Navigate to the **Providers > Credentials** tab

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS

Workers Services Provider ID Numbers Contracts Beds Linked Providers Aliases

Providers Divisions Forms Enrollments Authorizations Notes Credentials EVV

4. Select **Word Merge > Cover Letter with Certificate of Service**

Word Merge



5. When finished, Click **File > Print** to print the updated Word Merge and then **File > Save, File > Close**
6. In iConnect, Click **Upload and Save to Note** after saving the word document
7. In the new Note record, update the following fields:
 - "Division" = APD
 - "Associated Form ID#" = Enter Form ID# if applicable
 - "Note Type" = Initial Application
 - "Note Subtype" = Signed License Certificate
 - "Description" = Signed License Certificate
 - "Note" = Enter notes
 - "Status" = Complete
 - Click "Add Attachment" and search for the copy of the signed License Certificate and the Cover Letter on the user's device. Click Upload
 - Click the Lookup button on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
 - Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note
 - Click the Lookup button on the "Add Note Recipient" to add the *Agency Clerk* as the Note Recipient
 - Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division *	APD
Note By *	Reed, Monica
Note Date *	09/25/2023
Associated Form ID#	
Note Type *	Initial Application
Note Sub-Type	Signed License Certificate
Description	Signed License Certificate
<input type="button" value="B"/> <input type="button" value="Z"/> <input type="button" value="U"/> 16px <input type="button" value="A"/>	
Note	
Status *	Complete
Date Completed	09/25/2023
Attachments Add Attachment	
Document	Description
There are no attachments to display	
Note Recipients <input type="text" value="Add Note Recipient"/> <input type="button" value="Lookup"/> <input type="button" value="Clear"/>	

8. When finished click **File > Save and Close Notes**

File Tools

- Spell Check
- Save Notes
- [Save and Close Notes](#)
- Print
- Close Notes



The Licensing Specialist will then mail the hardcopy signed Original License Certificate along with the Cover Letter to the Service Provider.

As Needed: Site Visit Violations Note



The Licensing Specialist will enter a Facility Site Visit Note when the site visit is complete with issues or deficiencies.

1. Set “Role” = Region QA Workstream Worker then click **Go**.

A screenshot of a search interface. At the top, there is a dropdown menu labeled 'Role' with the option 'Region QA Workstream Worker' selected. To the right of the dropdown is a 'GO' button. A black arrow points from the text in step 1 to this 'GO' button.

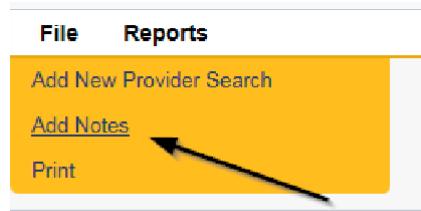
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click **GO**

A screenshot of the iConnect software interface. At the top, there is a 'Quick Search' bar with the text 'A Test Provider' entered. Below the search bar, there is a navigation bar with tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (which is highlighted in yellow), 'INCIDENTS', 'CLAIMS', and 'SCHEDULER'. A black arrow points from the text in step 2 to the 'PROVIDERS' tab.

3. The Provider’s record will display. Navigate to the **Providers > Notes** tab

A screenshot of the 'Providers > Notes' tab. At the top, there is a 'Quick Search' bar with the text 'A TEST Provider (10002)' entered. Below the search bar, there is a navigation bar with tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', and 'SCHEDULER'. A black arrow points from the text in step 3 to the 'NOTES' tab. At the bottom of the screen, there is a 'Filters' section with dropdown menus for 'Note Type' and 'Note Date'.

4. Click **File > Add Notes**



5. In the new Note record, update the following fields:

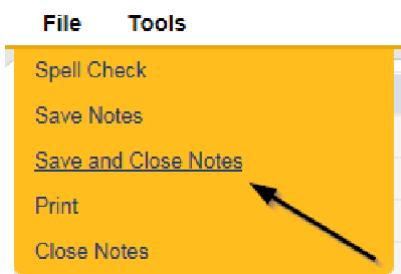
- "Note Type" = Initial Application
- "Note Subtype" = Site Visit Complete with issues or deficiencies
- "Description" = Site Visit Complete with issues or deficiencies
- "Note" = Enter notes for all deficiencies/issues
- "Status" = Pending
- Click the Lookup button on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

The screenshot shows the 'Notes Details' form with the following field highlights:

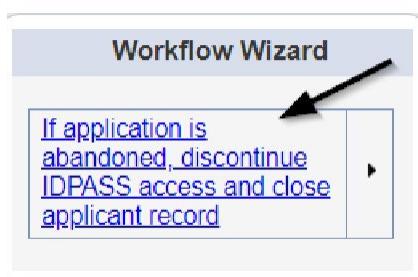
- Associated Form ID#**: Points to the text input field containing '352'.
- Note Type ***: Points to the dropdown menu showing 'Initial Application'.
- Note Sub-Type**: Points to the dropdown menu showing 'Site Visit Complete with issues or deficiencies'.
- Description**: Points to the text input field containing 'Site Visit Complete with issues or deficiencies'.
- Note**: Points to the rich text editor area.
- Status ***: Points to the dropdown menu showing 'Pending'.

Below the main form, there are sections for **Attachments** (with an 'Add Attachment' button) and **Note Recipients** (with an 'Add Note Recipient' input field, a 'Lookup' button, and a 'Clear' button). A large black arrow points from the 'Note Recipients' section towards the 'Lookup' button.

6. When finished click **File > Save and Close Notes**



7. Upon saving the initial application record, a Workflow Wizards is triggered



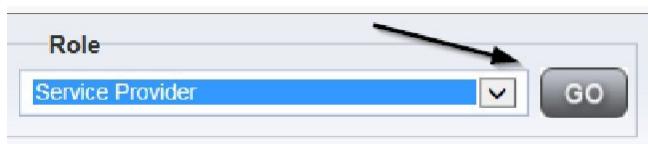
- Tickler - “If application is abandoned, discontinue ID PASS access and close applicant record”
- Assigned to *Self*
- Due in 120 calendar days

As Needed: Corrective Actions Update

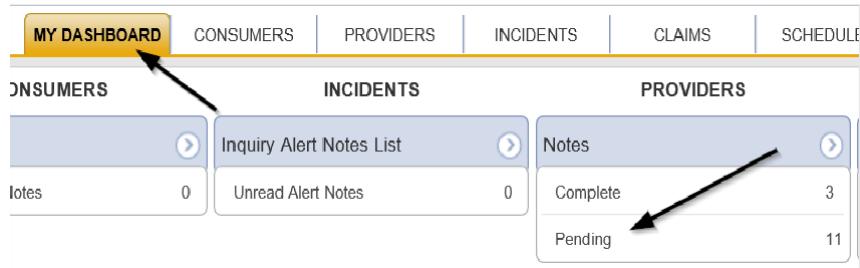


The Service Provider will update the existing note to advise the Licensing Specialist (Region QA Workstream Worker) of the corrective actions taken for the unmet items. This process will be repeated until all items and documentation have been updated.

1. Set “Role” = Service Provider then click **Go**



2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.



3. Select the **Note Type = Initial Application** with a **Description = Site Visit Complete with issues or deficiencies** and select the pending record via the hyperlink.



4. In the existing Note record, update the following fields:

- "Append Text to Note" = Enter notes with corrective action for Unmet items
- "Status" = Leave as Pending
- Click "Add Attachment" and search for the copy of supporting documents on the user's device (if applicable). Click Upload
- Click the Lookup button on the "Add Note Recipient" to add the **Licensing Specialist**(Region QA Workstream Worker) as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division *	APD
Note By *	Reed, Monica
Note Date *	10/22/2023
Note Type *	Initial Application
Note Sub-Type	Site Visit Complete with issues or deficiencies
Description	Site Visit Complete with issues or deficiencies

Note

New Text

B I U 10pt. **A** Enter notes with corrective action for Unmet items

Append Text to Note

Status *

Pending

Date Completed

Attachments

Add Attachment

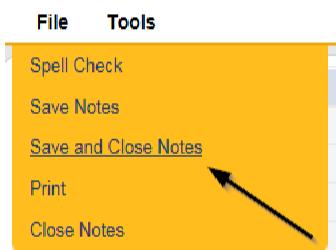
Document Description

There are no attachments to display

Note Recipients

Add Note Recipient: **Lookup** **Clear**

5. When finished click **File > Save and Close Notes**





The Licensing Specialist and Service Provider will leave the note in a Pending Status until all issues/deficiencies have been resolved. This process can be repeated multiple times.

As Needed: Add Appointment for CMS Compliance Site Visit



The CMS Compliance Specialist will schedule the site visit to initiate compliance monitoring and add the appointment information into iConnect. If the Site visit needs to be edited or rescheduled proceed to [Reschedule Site Visit Appointment](#)

1. Set “Role” = Region QA Workstream Worker then click **Go**.

A screenshot of a web interface showing a dropdown menu labeled 'Role' with the option 'Region QA Workstream Worker' selected. To the right of the dropdown is a 'GO' button. A black arrow points from the text above to this 'GO' button.

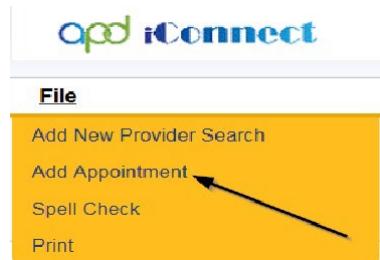
2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click go.

A screenshot of the iConnect provider search interface. The 'PROVIDERS' tab is highlighted. In the top navigation bar, there is a 'Quick Search' field with 'A Test Provider' in the 'Providers' dropdown and 'Provider Name' in the 'Provider Name' dropdown. Below the search bar, there are tabs for 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS', 'INCIDENTS', 'CLAIMS', 'SCHEDULER', and 'UTILITIES'. A black arrow points from the text above to the 'GO' button in the search bar.

3. The Provider’s record will display. Navigate to the **Providers > Appointments** tab.

A screenshot of the provider appointment list interface. The 'PROVIDERS' tab is highlighted. The 'Appointments' tab is also highlighted in yellow. At the top, there is a 'Filters' section with dropdowns for 'Status' (set to 'Equal To' and 'Pending'), 'Type' (with a '+' button), and buttons for 'Search' and 'Reset'. Below the filters, a message says '4 Appointments record(s) returned - now viewing 1 through 4'. A table below shows four appointment records with columns for 'Type', 'Start Date', and 'End Date'. A black arrow points from the text above to the 'Appointments' tab.

4. Click **File > Add Appointment**

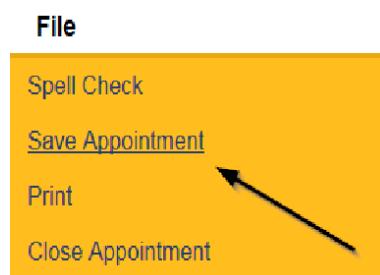


5. Update the following fields on the Appointment Details page

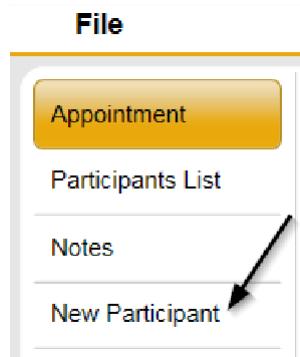
- a. "Division" = APD
- b. "Appointment Start Date" = Update date
- c. "Start Time" = Update time
- d. "Appointment End Date" = Update date
- e. "End Time" = Update time
- f. "Type" = Site Visit
- g. "Description" = Enter description
- h. "Status" = Scheduled

The image shows the 'Appointments' details page. It lists several fields with arrows pointing to them from the left, indicating where to click: 'Division' (with an arrow pointing to the dropdown menu), 'Appointment Date *' (with an arrow pointing to the date input field), 'Start Time' (with an arrow pointing to the time dropdown), 'Appointment End Date' (with an arrow pointing to the end date input field), 'End Time' (with an arrow pointing to the end time dropdown), 'Type *' (with an arrow pointing to the dropdown menu), 'Subject' (with an arrow pointing to the subject input field), and 'Status *' (with an arrow pointing to the status dropdown menu).

6. When finished select **File > Save Appointment**



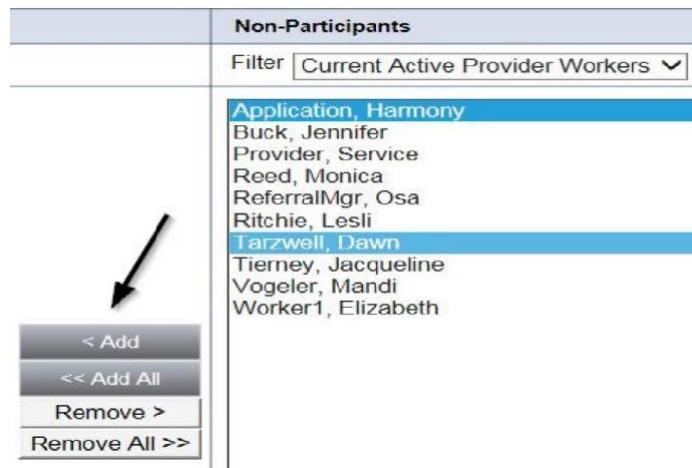
7. Click **New Participant** on the left-hand navigation menu



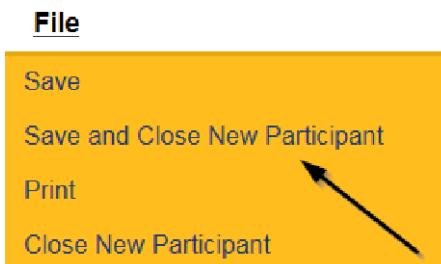
8. Set the **Non-Participants filter** list to the appropriate value in order to select the appointment participants



9. Select the appropriate Licensing Specialist and Service Provider Worker names by holding the control key down and clicking on the names and then **Click < Add**



10. When finished, Select **File > Save and Close New Participant**



As Needed: CMS Compliance Site Visit Complete Note – No Issues



The CMS Compliance Specialist will enter a Site Visit Note when the site visit is complete and update the CMS Compliance License record. They will complete the CMS Residential Monitoring Tool outside of iConnect. It will be attached to this note.

NOTE: If the CMS Compliance Specialist identifies issues/deficiencies, they will proceed with a Plan of Remediation outside of iConnect.

1. Set “Role” = Region QA Workstream Worker then click **Go**.

A screenshot of a software interface showing a dropdown menu labeled 'Role' with the option 'Region QA Workstream Worker' selected. To the right of the dropdown is a large 'GO' button, with a black arrow pointing directly at it.

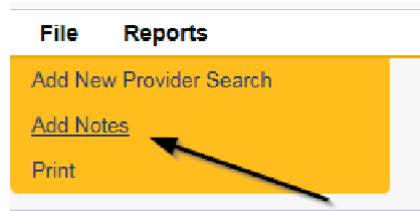
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click **GO**

A screenshot of the iConnect provider search interface. At the top, there is a 'Quick Search' bar with the text 'A Test Provider' and dropdowns for 'Providers' and 'Provider Name'. Below the search bar is a navigation bar with tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (which is highlighted in yellow), 'INCIDENTS', 'CLAIMS', and 'SCHEDULER'. A black arrow points to the 'GO' button on the right side of the search bar.

3. The Provider's record will display. Navigate to the **Providers > Notes** tab

A screenshot of the provider notes tab. At the top, there is a 'Quick Search' bar with the text 'A TEST Provider (10002)' and dropdowns for 'Providers' and 'Provider Name'. Below the search bar is a navigation bar with tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (highlighted in yellow), 'INCIDENTS', 'CLAIMS', and 'SCHEDULER'. The main area shows a table for 'A TEST Provider (10002)' with columns: Workers, Services, Provider ID Numbers, Contracts, Badges, Linked Providers, Aliases, Conditions, Providers, Divisions, Firms, Enrollments, Authorizations, Notes (which is highlighted in yellow), Credentials, and PVV Scheduling. A black arrow points to the 'GO' button on the right side of the search bar.

4. Click **File > Add Notes**



5. In the new Note record, update the following fields:

- "Division" = APD
- "Note Type" = Facility Site Visit
- "Note Subtype" = CMS Site Visit Complete with no deficiencies
- "Description" = CMS Site Visit Complete with no deficiencies
- "Note" = Enter notes
- "Status" = Complete
- Click "Add Attachment" and search for the copy of the CMS Residential Monitoring Tool on the user's computer. Click Upload
- NOTE: Each attachment can be up to 18mb in size***
- Click the Lookup button on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note Ry * Reed, Monica

Note Date * 09/29/2023

Associated Form IU# ←

Note Type * ←

Note Sub-Type ←

Description ←

Note ←

Status * ←

Attachments ←

Document Description

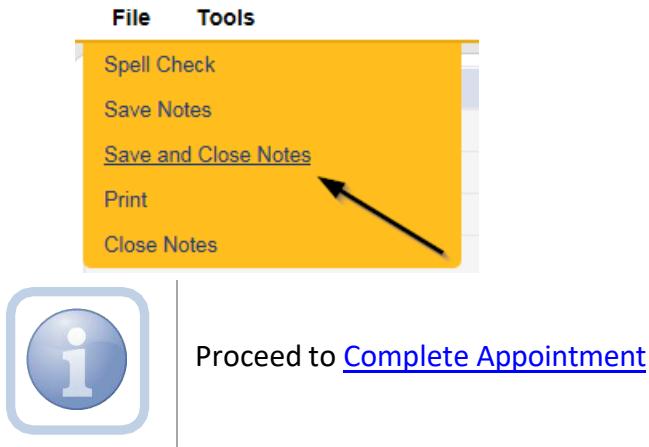
There are no attachments to display

Note Recipients

Add Note Recipient

Lookup Clear

6. When finished click **File > Save and Close Notes**



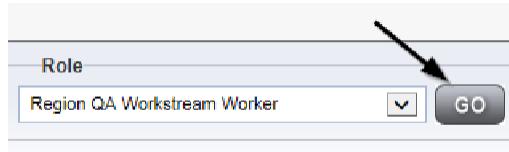
As Needed: CMS Compliance Site Visit Complete Note – Issues



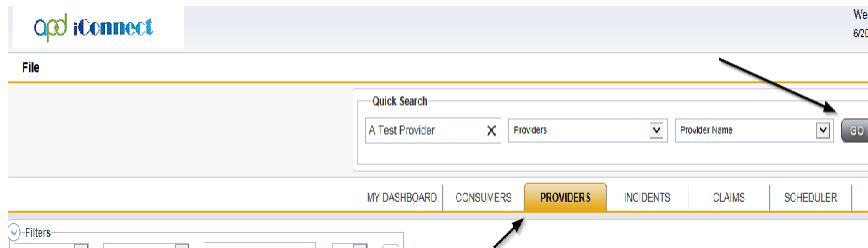
The CMS Compliance Specialist will enter a Site Visit Note when the site visit is complete.

NOTE: If the CMS Compliance Specialist identifies issues/deficiencies, they will proceed with a Plan of Remediation outside of iConnect after adding the note.

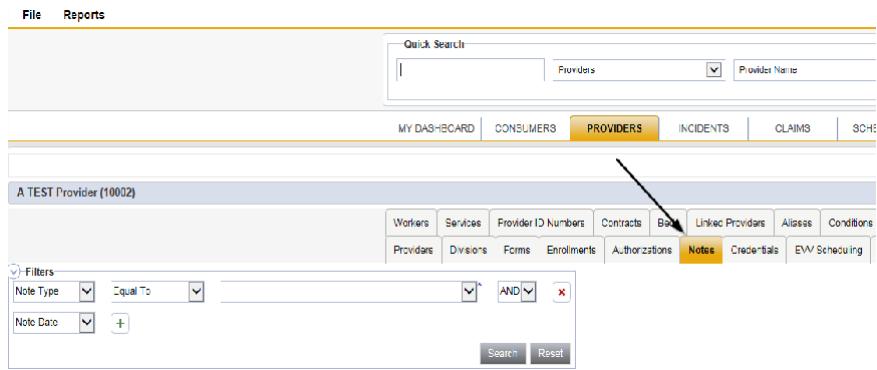
1. Set “Role” = Region QA Workstream Worker then click **Go**.



2. Navigate to the **Providers** chapter and enter the Provider’s name in the Quick Search filter and click **GO**



3. The Provider’s record will display. Navigate to the **Providers > Notes** tab



4. Click **File > Add Notes**



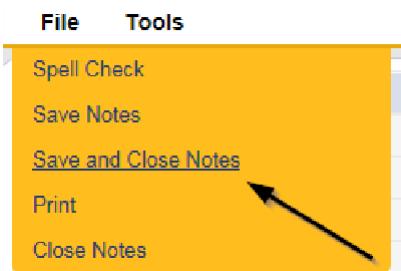
5. In the new Note record, update the following fields:

- a. "Division" = APD
- b. "Note Type" = Facility Site Visit
- c. "Note Subtype" = CMS Site Visit Complete with deficiencies
- d. "Description" = CMS Site Visit Complete with deficiencies
- e. "Note" = Enter notes
- f. "Status" = Complete
- g. Click "Add Attachment" and search for the copy of the CMS Residential Monitoring Tool on the user's computer. Click Upload
- h. ***NOTE: Each attachment can be up to 18mb in size***
- i. Click the Lookup button on the "Add Note Recipient" to add the ***Service Provider*** as the Note Recipient
- j. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division *	APD
Note By *	Reed, Monica
Note Date *	09/29/2023
Associated Form ID#	
Note Type *	
Note Sub-Type	
Description	CMS Site Visit Complete with deficiencies
<p>Note</p> <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>	
Status *	Complete
Date Completed	09/29/2023
<p>Attachments</p> <p>Add Attachment</p>	
Document	Description
There are no attachments to display	
<p>Note Recipients</p> <p>Add Note Recipient: <input type="text"/> <input type="button" value="Lookup"/> <input type="button" value="Clear"/></p>	

6. When finished click **File > Save and Close Notes**



As Needed: Add CMS Compliance License Information

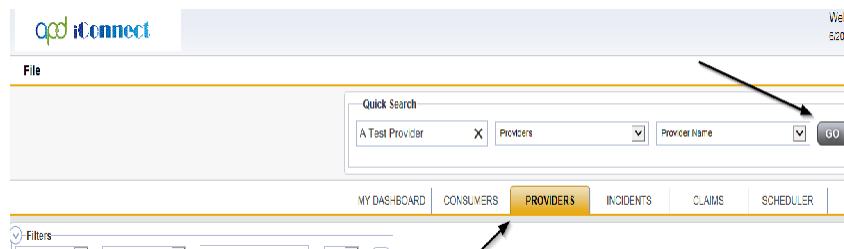


The Licensing Specialist will add the CMS Compliance License Information

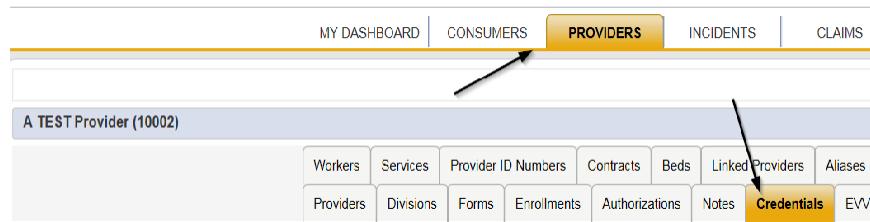
1. Set “Role” = Region QA Workstream Worker then click **Go**.

Role	Region QA Workstream Worker	<input type="button" value="GO"/>
------	-----------------------------	-----------------------------------

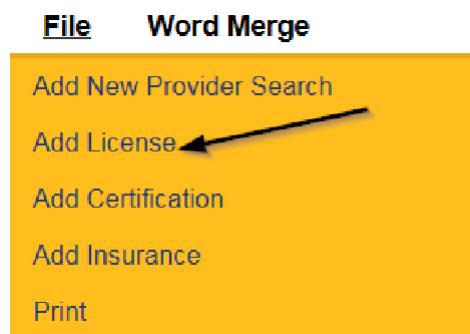
2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click **Go**.



3. The Provider's record will display. Navigate to the **Providers > Credentials** tab



4. Select **File > Add License**

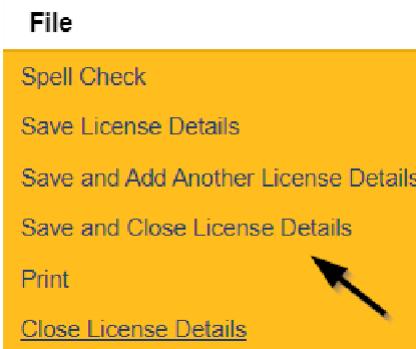


5. Update the following fields:

- "License Type" = CMS Compliance
- "Effective Date" = Enter Date
- "Comment" = Enter comments if applicable
- "Status" = CMS Compliance Monitoring Required
- "QA Workstream Worker" = Click Lookup button on the field to Add the **CMS Compliance Specialist**. Enter the Last Name and Click Search and then select the Name

License Details	
Credential Type *	License
License Type *	<input type="text" value="CMS Compliance"/>
Date of Renewal/Subsequent License	<input type="text"/>
Effective Date *	<input type="text" value="09/01/2023"/>
Less than One Year	<input type="checkbox"/>
Comment	<input type="text" value="Initiate Compliance Monitoring - newly licensed home"/>
Status	<input type="text" value="CMS Compliance Monitoring Required"/>
QA Workstream Worker	<input type="text" value="Reed, Monica"/> <input type="button" value="Lookup"/> <input type="button" value="Clear"/> <input type="button" value="Details"/>

6. When finished, click **File > Save and Close License Details**



Proceed with Plan of Remediation outside of iConnect

As Needed: Link Child Provider

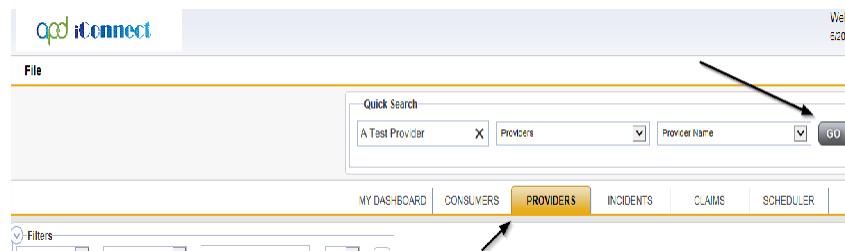


If a Parent Provider record exists for the new Provider – the Licensing Specialist will need to link the new facility to the Parent Provider

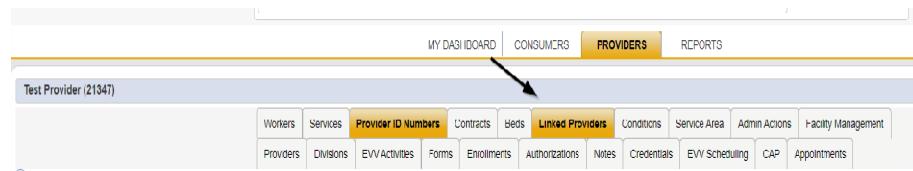
1. Set “Role” = Region QA Workstream Worker then click **Go**.

Role	<input type="text" value="Region QA Workstream Worker"/>	<input type="button" value="GO"/>
------	--	-----------------------------------

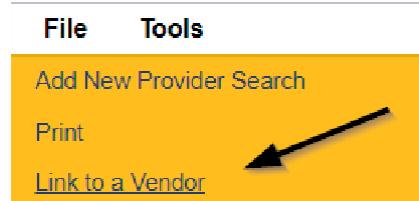
2. Navigate to the **Providers** chapter and enter the **PARENT** Provider's name in the Quick Search filter and click **Go**.



3. Navigate to the **Providers > Linked Providers** tab



4. Select **File > Link to a Vendor**



5. Update the following fields:

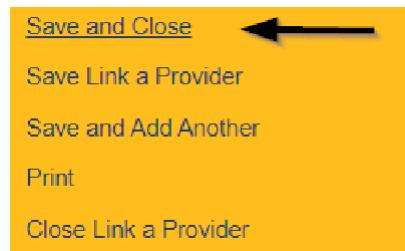
- Relationship = Subsidiary
- Linked Provider = Click ellipsis and search for Child Provider record
- Start Date = Enter Date

Search By: Name Search Text: Search Cancel

4 record(s) returned

NAME	PROVIDER ID	CITY	STREET	MEDICAID ID	PROVIDER NO	PROVIDER ID NUMBER TYPE	PROVIDER ID NUMBER IDENTIFIER
Test Provider	21347	Jacksonville	9125 Branchwater Ct	FL545454	21347	SenderId	21347_Test
Test9 QO Support	21359				F123456789001	SenderId	21359_TEST9
Test9 WSC	21358	TALLAHASSEE	1234 street	234567890		Treating Provider	234567890
Tester 1 Level 1	17216			123531234		SenderId	17216_TESTE

6. When finished, Select **File > Save and Close**



7. Navigate back to the Child record and validate that the Linked Provider tab shows the Corporate Parent record

Test Provider [21347] ←

Workers Services Provider ID Numbers Contracts Beds **Linked Providers** Conditions Service Area Admin Actions Facility Manager

Providers Divisions EVV Activities Forms Enrollments Authorizations Notes Credentials EVV Scheduling CAP Appointments

Filters

1 Providers Linked Providers record(s) returned - now viewing 1 through 1

Linked As	Provider	Street	City	State	Zip Code	Status
Corporate	Test9 QO Support	1234 street	Lakewood	FL	33501	Active

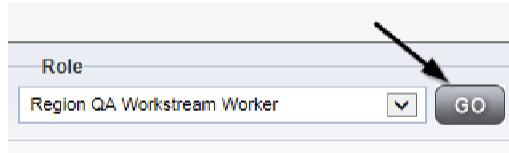
As Needed: Initial Application with Errors



The Licensing Specialist will review the Licensing Application and all notes and attachments. If there are errors/omissions, the Licensing Specialist will inform the Prospective Applicant by updating the pending note. Once all errors/omissions are resolved, reviewed and

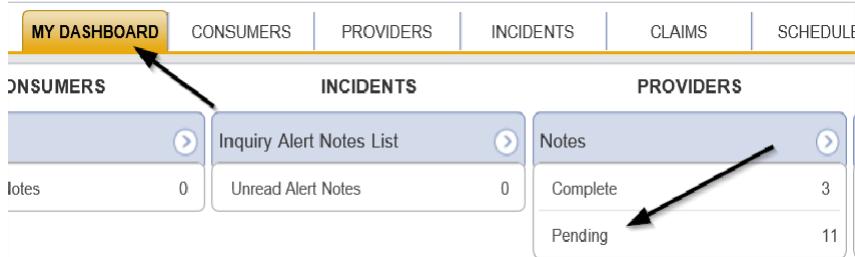
approved, the Licensing Specialist will update the note to complete

1. Set "Role" = Region QA Workstream Worker then click **Go**.



Role
Region QA Workstream Worker

2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

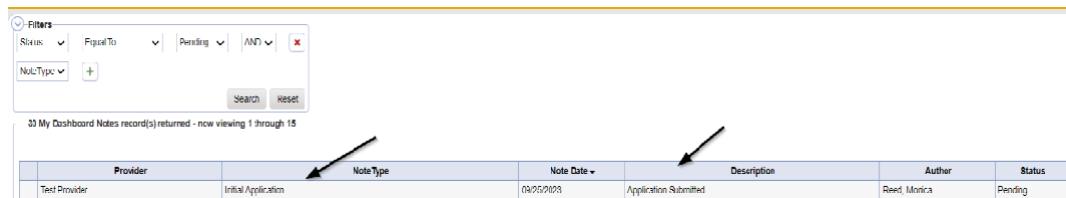


MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULE

CONSUMERS INCIDENTS PROVIDERS

Notes	Unread Alert Notes	Notes	Complete	Pending
0	0	3	3	11

3. Select the Note Type = **Initial Application** and Description = **Application Submitted** and select the pending record via the hyperlink.



Filters: Status: Equal To Pending AND NoteType:

33 My Dashboard Notes record(s) returned - now viewing 1 through 15

Provider	NoteType	Note Date	Description	Author	Status
Test Provider	Initial Application	09/25/2023	Application Submitted	Reed, Monica	Pending

4. In the existing Note record, update the following fields:

- "Division" = APD
- "Note Type" = Leave as Initial Application
- "Note Subtype" = Update to Errors/Omissions
- "Description" = Errors/Omissions
- "Note" = Enter notes specific to the outstanding errors/omissions
- "Status" = Pending (if there are errors or omissions)



The Service Provider will need to respond with the appropriate documentation if there are errors or omissions and attach it back to this note. ***The Status will be updated to complete by the Licensing Specialist*** when there are NO errors or omissions.

- g. Click the Lookup button on the "Add Note Recipient" to add the *Service Provider* as the Note Recipient
- h. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division *	APD
Note By *	Reed, Monica
Note Date *	09/25/2023
Associated Form ID	
Note Type *	Initial Application
Note Sub-Type	Errors/Omissions
Description	Errors/Omissions

On 9/25/2023 at 7:35 PM, Monica Reed wrote:
Enter notes specific to the outstanding errors/omissions

Note

New Text

Status *

Date Completed

Attachments

Document

Description

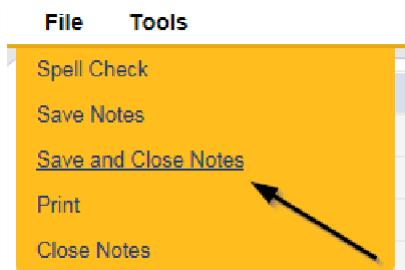
There are no attachments to display

Note Recipients

Add Note Recipient:

Lookup Clear

5. When finished click **File > Save and Close Notes**.



6. Upon saving the initial application record, a Workflow Wizards is triggered



- a. Tickler - "If application is abandoned, discontinue ID PASS access and close applicant record"
- b. Assigned to *Self*
- c. Due in 120 calendar days

As Needed: Update Application

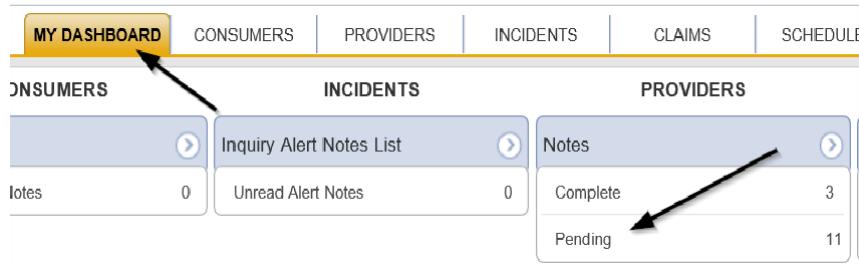


The Prospective Applicant will get notified of the pending note via My Dashboard and will review the errors/omissions provided by the Licensing Specialist. The Prospective Applicant will then respond to the pending note with the requested corrections and leave it in pending status until no additional corrections are needed.

1. Set "Role" = Service Provider then click **Go**



2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.



3. Select the **Note Type = Initial Application** and **Description = Errors/Omissions** and select the pending record via the hyperlink.

Provider	NoteType	Note Date	Description	Author	Status
test-provider	Initial Application	09/26/2023	Errors/Omissions	Reed, Monica	Pending

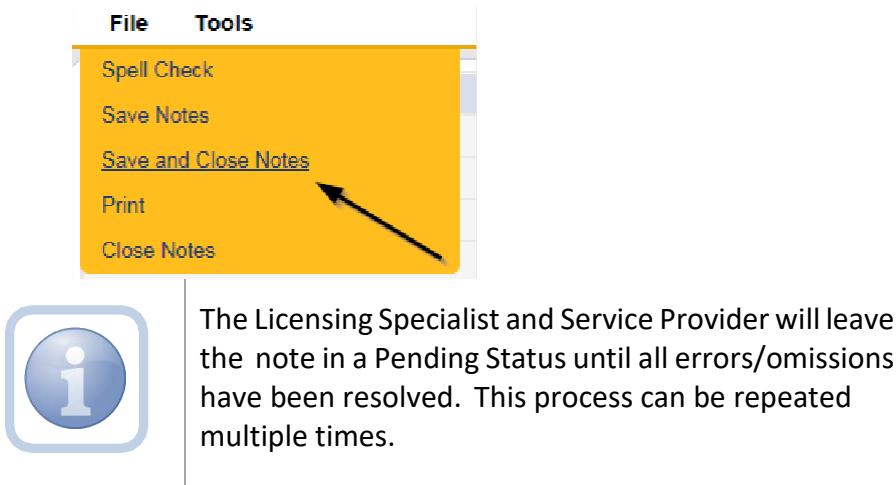
4. In the existing Note record, update the following fields:

- "Note" = Enter Notes as to what corrections have been made
- "Status" = Leave Status as Pending.
- Click the Lookup button on the "Add Note Recipient" to add the **Licensing Specialist** as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note.

Notes Details

Division *	APD
Note By *	Reed, Monica
Note Date *	09/26/2023
Note Type *	Initial Application
Note Sub-Type	Errors/Omissions
Description	On 9/26/2023 at 10:51 PM, Monica Reed wrote: Enter Notes as to what corrections have been made
Note	<p>New Text</p> <p>B I U 16px A</p> <p>Append Text to Note</p>
Status *	Pending
Date Completed	
Attachments	Add Attachment
Document	Description
There are no attachments to display	
Note Recipients	
Add Note Recipient <input type="text"/> <input type="button" value="Lookup"/> <input type="button" value="Clear"/>	

- When finished, click **File > Save and Close Notes**



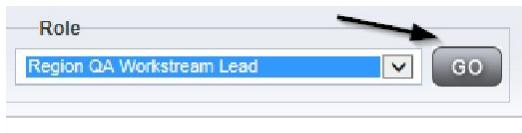
The Licensing Specialist and Service Provider will leave the note in a Pending Status until all errors/omissions have been resolved. This process can be repeated multiple times.

As Needed: Further Documentation Required



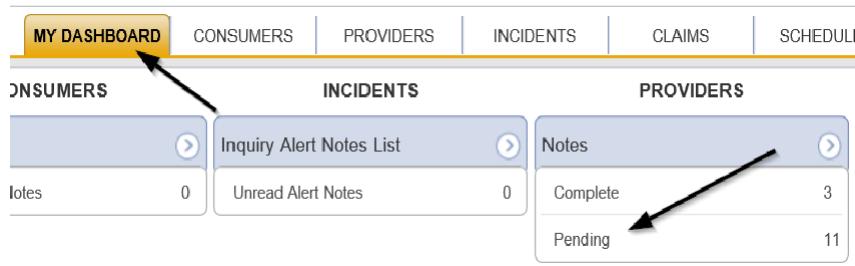
If further documentation is required, the Licensing Supervisor will update the existing Initial Application/Supervisor Review note to the Licensing Specialist. If the ROM is requesting Further documentation, they will add a new note. Proceed to

- Set "Role" = QA Workstream Worker/Lead then click **Go**



- If **Supervisor** is requesting Further Documentation:

- Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.



- Select the **Note Type = Initial Application/Supervisor Review** and select the pending record via the hyperlink.

My Dashboard Notes						
Filters		Provider	NoteType	Note Date	Description	Author
31 My Dashboard Notes record(s) returned now viewing 1 through 15						
	NoteType	Initial Application/Supervisor Review	09/26/2023		Reed, Monica	Pending

4. If **Supervisor** is requesting further documentation:

- In the existing Initial Application/Supervisor Review Note record, update the following fields:
 - "Associated Form ID#" = Enter Form ID# if applicable
 - "Note Subtype" = Update to Further Documentation Required
 - "Description" = Update to Further Documentation Required
 - "Note" = Enter Notes as to what information is needed
 - "Status" = Complete
 - Click the Lookup button on the "Add Note Recipient" to add the *Licensing Specialist* as the Note Recipient
 - Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note.

Notes Details

Division *	APD
Note By *	Reed, Monica
Note Date *	09/26/2023
Associated Form ID#	<input type="text"/>
Note Type *	Initial Application/Supervisor Review
Note Sub-Type	Further Documentation Required
Description	Further Documentation Required
On 9/26/2023 at 10:06 PM, Monica Reed wrote: Enter Notes for what information is needed	
Note	<input type="text"/>
New Text	
Append Text to Note	
Status *	Complete
Date Completed	09/26/2023
Attachments	
Add Attachment	
Document	Description
There are no attachments to display	
Note Recipients	
Add Note Recipient: <input type="text"/> <input type="button" value="Lookup"/> <input type="button" value="Clear"/>	

5. If ROM is requesting further documentation:

a. Click **File > Add Notes**



b. In the new Note record, update the following fields:

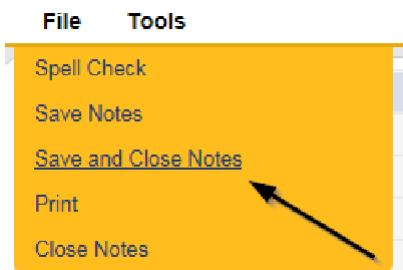
- i. "Associated Form ID#" = Enter Form ID# if applicable
- ii. "Note Type" = Initial Application/ROM Approval
- iii. "Note Subtype" = Further Documentation Required
- iv. "Description" = Further Documentation Required
- v. "Note" = Enter Notes as to what information is needed
- vi. "Status" = Complete
- vii. Click the Lookup button on the "Add Note Recipient" to add the *Licensing Specialist* as the Note Recipient
- viii. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note.

A screenshot of the 'Notes Details' form. The form has several sections with validation stars: 'Division*', 'Note By*', 'Note Date*', 'Associated Form ID#', 'Note Type*', 'Note Sub-Type', 'Description', 'Note', 'Status*', 'Date Completed', and 'Attachments'. Arrows point to the following fields:

- Associated Form ID#
- Note Type*
- Note Sub-Type
- Description
- Note
- Status*

A large arrow points from the text 'Note Recipients' in step 5.b. to the 'Add Note Recipient' input field in the 'Note Recipients' section at the bottom of the form.

6. When finished click **File > Save and Close Notes**



As Needed: Requested Information

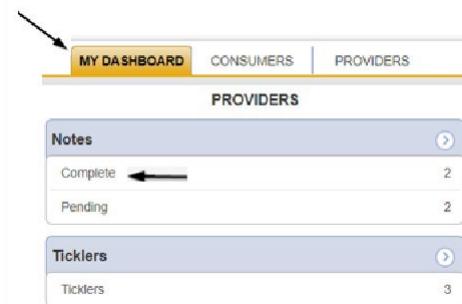


The Licensing Specialist will be notified of the Further Documentation note via My Dashboard. They will request information from the Prospective Applicant via a new note.

1. Set “Role” = QA Workstream Worker or Lead then click **Go**



2. Navigate to the **My Dashboard > Providers > Notes > Complete** and click the hyperlink for the Pending notes.

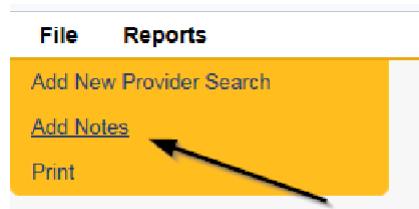


3. Select the **Note Type = Initial Application/Supervisor Review** and **Subtype = Further Documentation Required** and select the record via the hyperlink.



4. Review the note for the requested documentation then close the note.

5. The Licensing Specialist will create a new note to communicate with the Provider. Navigate to the **Provider > Notes tab**. Click **File > Add Notes**



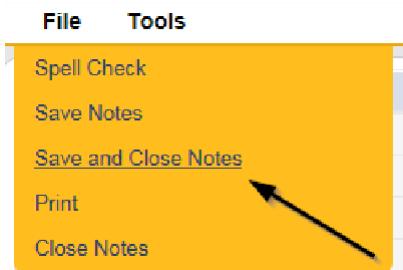
6. In the new Note record, update the following fields:

- a. "Division" = APD
- b. "Associated Form ID#" = Enter Form ID# if applicable
- c. "Note Type" = Initial Application
- d. "Note Subtype" = Further Documentation Required
- e. "Description" = Further Documentation Required
- f. "Note" = Enter notes as to what is being requested
- g. "Status" = Pending
- h. Click the Lookup button on the "Add Note Recipient" to add the *Prospective Applicant* as the Note Recipient
- i. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

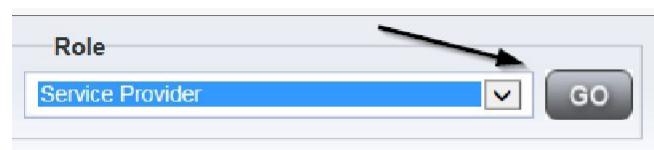
Notes Details

Division *	APD
Note By *	Reed, Monica
Note Date *	09/26/2023
Associated Form ID#	352
Note Type *	Initial Application
Note Sub-Type	Further Documentation Required
Description	Further Documentation Required
Note	Enter notes as to what is being requested
Status *	Pending
Date Completed	
Attachments	
Add Attachment	
Document	Description
There are no attachments to display	
Note Recipients	
Add Note Recipient:	Lookup

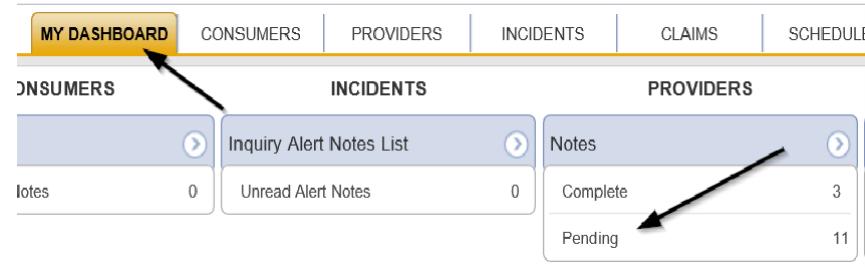
7. When finished click **File > Save and Close Notes**



8. Set "Role" = Service Provider



9. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.



10. Select the **Note Type = Initial Application** and **Subtype = Further Documentation Required** and select the pending record via the hyperlink.



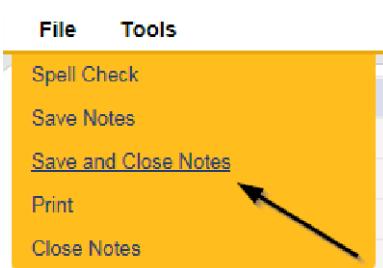
11. Review the note, then add the requested information to the existing note. Update the following fields:

- "Note Subtype" = Leave as to Further Documentation Required
- "Description" = Leave as Further Documentation Required
- "Note" = Enter notes as to what attachments have been provided
- "Status" = Leave as Pending
- Click "Add Attachment" and search for the copy of supporting documents on the user's device. Click Upload

- f. Click the Lookup button on the "Add Note Recipient" to add the *Licensing Specialist* as the Note Recipient
- g. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

The screenshot shows the Notes Details window and a New Text window. The Notes Details window contains fields for Division (APD), Note By (Reed, Monica), Note Date (09/26/2023), Note Type (Initial Application), Note Sub-Type (Further Documentation Required), and a Description text area. The New Text window has a rich text editor toolbar and a text area containing the instruction: "Enter notes as to what corrections/revisions have been made and what attachments have been provided". Arrows point from the Note Type, Note Sub-Type, and Description fields in the Notes Details window to the text area in the New Text window. Another arrow points from the Status field in the Notes Details window to the Status field in the New Text window. A third arrow points from the Add Attachment button in the Notes Details window to the attachments section in the New Text window, which displays the message: "There are no attachments to display".

12. When finished click **File > Save and Close Notes**



13. Set “Role” = QA Workstream Worker or Lead then click **Go**

14. The Licensing Specialist will review the note submitted by the Service Provider to ensure all requested information/documentation was provided.

15. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

16. Select the **Note Type = Initial Application and Subtype = Further Documentation Required** and select the pending record via the hyperlink.

Provider	Note Type	Note Date	Description	Author	Status
Test Provider	Initial Application	09/26/2023	Further Documentation Required	Reed, Monica	Pending

17. Review the contents of the note. Update the following fields to forward the note to the Licensing Supervisor or ROM.

- “Note Type” = Update to Initial Application/Supervisor Review
- “Sub Type” = Update to Further Documentation Provided
- “Description” = Update to Further Documentation Provided
- “Notes” = add any additional details for the Supervisor or ROM regarding the requested documentation that was provided by the Service Provider.
- “Status” = Leave as Pending
- Click the Lookup button on the “Add Note Recipient” to add the **Licensing Supervisor or ROM** as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division *	APD
Note By *	Reed, Monica
Note Date *	09/26/2023
Note Type *	Initial Application/Supervisor Review
Note Sub-Type	Further Documentation Provided
Description	Further Documentation Provided

On 9/26/2023 at 10:14 PM, Monica Reed wrote:
Enter notes as to what is being requested
On 9/26/2023 at 10:22 PM, Monica Reed wrote:
Enter notes as to what corrections/revisions have been made and what attachments have been provided
On 9/26/2023 at 10:37 PM, Monica Reed wrote:
add any additional details for the Supervisor or ROM regarding the requested documentation that was provided by the Service Provider

Note

New Text

B I U 16px A

Append Text to Note

Status *

Pending

Date Completed

Attachments

Add Attachment

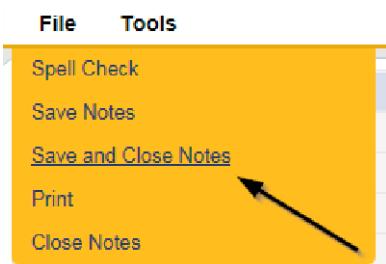
Document Description

There are no attachments to display

Note Recipients

Add Note Recipient:

18. When finished click **File > Save and Close Notes**





Proceed to [Supervisor Approval](#). Even if the ROM requested the documentation, the Supervisor must approve it first.

As Needed: Abandoned Application



If the reminder tickler is received after 120 calendar days, or if the Prospective Applicant stops working on the application for more than 90 days, the application will be deemed abandoned by the Licensing Specialist. The Licensing Specialist will need to discontinue ID PASS access and close the prospective applicant record. The Prospective Applicant must reapply.

1. Set “Role” = Region QA Workstream Worker/Lead then click **Go**.

A screenshot of a search interface. At the top, there is a dropdown menu labeled 'Role' with the option 'Region QA Workstream Lead' selected. To the right of the dropdown is a 'GO' button. A black arrow points from the text in step 1 to the 'GO' button.

2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click **Go**.

A screenshot of the iConnect software interface. At the top, there is a 'File' menu and a 'Quick Search' bar containing the text 'A Test Provider'. Below the search bar, there is a navigation bar with tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (which is highlighted in yellow), 'INCIDENTS', 'CLAIMS', and 'SCHEDULER'. A black arrow points from the text in step 2 to the 'PROVIDERS' tab.

3. The Provider's record will be displayed. Navigate to the **Providers > Divisions** tab.

A screenshot of the 'Providers > Divisions' tab. At the top, there is a header with tabs: 'Workers', 'Services', 'Provider ID Numbers', 'Contracts', 'Beds', 'Li', 'Providers' (which is highlighted in yellow), 'Divisions' (which is also highlighted in yellow), 'EVV Activities', 'Forms', 'Enrollments', and 'Aut'. Below the header, there is a 'Filters' section with dropdown menus for 'Disposition' (set to 'Not Equal To' and 'Closed') and 'Division' (set to '+'). There are also 'Search' and 'Reset' buttons. A black arrow points from the text in step 3 to the 'Divisions' tab. Below the filters, a message says '1 Providers Divisions record(s) returned - now viewing 1 through 1'. A table follows, with columns 'Division' and 'Disposition'. The single record is APD with Open disposition. A black arrow points from the table to the disposition column.

Division	Disposition
APD	Open

4. Select the “Open” APD Division record via the hyperlink for that row.



Division			
	Division	Disposition	Open Date
	APD	Open	01/01/2017

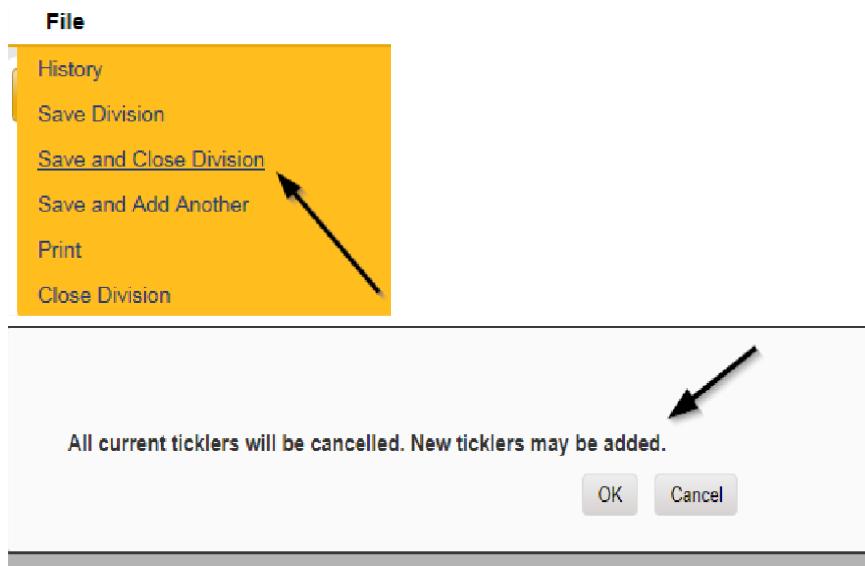
5. Update the following fields on the Division Detail screen.

- “Disposition” = Closed
- “Close Date” = Enter Date (defaults to today)



Division	Division Details								
APD	<table><tr><td>Disposition *</td><td>←</td><td>Closed</td></tr><tr><td>Open Date</td><td>01/01/2023</td></tr><tr><td>Close Date *</td><td>←</td><td>09/29/2023</td></tr></table>	Disposition *	←	Closed	Open Date	01/01/2023	Close Date *	←	09/29/2023
Disposition *	←	Closed							
Open Date	01/01/2023								
Close Date *	←	09/29/2023							

6. When finished, Select **File > Save and Close Division**. Click **OK** on the pop-up message box.



As Needed: Supervisor Denial



The Licensing Supervisor will review the application and add a note if denying the application. They will then send to the ROM for review. If additional actions are needed, proceed to [Further Documentation Required](#).

1. Set "Role" = Region QA Workstream Worker/Lead then click **Go**.

Role
Region QA Workstream Lead

2. Navigate to the **My Dashboard > Providers > Notes > Pending** and click the hyperlink for the Pending notes.

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS SCHEDULE

CONSUMERS INCIDENTS PROVIDERS

Notes	0	Inquiry Alert Notes List	0	Notes	3
		Unread Alert Notes	0	Complete	
				Pending	11

3. Select the **Note Type = Initial Application/Supervisor Review** and select the pending record via the hyperlink.

Filters
Status: Pending
Note type:

Provider	Note Type	Note Date	Description	Author	Status
test Provider	Initial Application/Supervisor Review	10/19/2023		Rod, Monica	Pending

4. In the pending Note record, update the following fields:

- "Associated Form ID#" = Enter Form ID# if applicable
- "Note Type" = Update to Initial Application/Supervisor Denial
- "Description" = Enter description if applicable
- "Append Text to Note" = Enter notes
- "Status" = Complete
- Click the Lookup button on the "Add Note Recipient" to add the *Licensing Specialist* as the Note Recipient
- Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

- h. Click the Lookup button on the "Add Note Recipient" to add an additional recipient – *ROM/Deputy ROM*
- i. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division * APD

Note By * Reed, Monica

Note Date * 09/29/2023

Associated Form ID# ←

Note Type * ←

Note Sub-Type

Description ←

Note ←

Status * ←

Complete

Date Completed 09/29/2023

Attachments

Add Attachment

Document Description

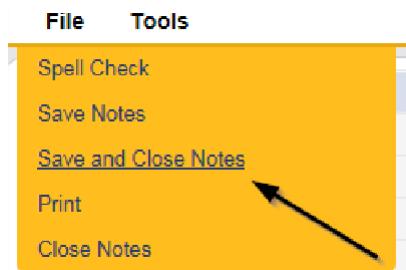
There are no attachments to display

Note Recipients

Add Note Recipient: ←

Lookup Clear

5. When finished click **File > Save and Close Notes**



Proceed to Chapter 13 to initiate the PAARF process

As Needed: ROM Denial



The ROM will review the application, add a new note for the denial. If additional actions are needed, proceed to [Further Documentation Required](#).

1. Set "Role" = ROM/Deputy then click **Go**.

A screenshot of a software interface showing a search bar and a dropdown menu. The dropdown menu is open, showing the option 'ROM/Deputy ROM' highlighted in blue. To the right of the dropdown is a grey 'GO' button with a white border.

2. Navigate to the **Providers > Notes** tab

A screenshot of a software interface showing the 'Providers' tab selected. Below the tabs, there is a search bar and a list of providers. The list shows 'A (1,831 Provider (10002))'. At the bottom of the screen, there is a navigation bar with various links, and the 'Notes' link is highlighted with a yellow box and an arrow pointing to it.

3. Click **File > Add Notes**

A screenshot of a software interface showing the 'File' menu selected. The 'File' menu has several options: 'Add New Provider Search', 'Add Notes', and 'Print'. The 'Add Notes' option is highlighted with a yellow box and an arrow pointing to it.

4. In the new Note record, update the following fields:

- a. "Division" = APD
- b. "Note Type" = Initial Application/ROM Denial
- c. "Description" = Enter description if applicable
- d. "Note" = Enter notes
- e. "Status" = Complete
- f. Click the Lookup button on the "Add Note Recipient" to add the *Licensing Specialist/Supervisor* as the Note Recipient
- g. Enter Last Name and Click Search in the pop-up browser window. Select the Name of the worker to attach them to the note

Notes Details

Division: APD

Note By: Reed, Monica

Note Date: 07/26/2022

Note Type: Initial Application/ROM Denial

Note Sub-Type:

Description:

Note:

Status: Complete

Date Completed: 07/26/2022

Attachments

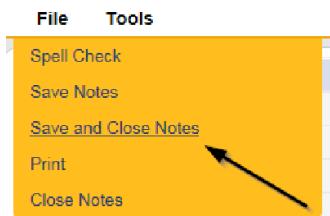
Document Description

There are no attachments to display

Note Recipients

Add Note Recipient: Lookup Clear

5. When finished click **File > Save and Close Notes**



The Licensing Specialist will be notified of the ROM Denial via this note. The Licensing Specialist will close the license record and will then proceed to Chapter 13 to initiate the PAARF process.

6. Set “Role” = Region QA Workstream Worker then click **Go**.

Role

Region QA Workstream Lead

GO

7. After reviewing the note accessed from **My Dashboard > Providers > Notes > Complete** navigate to the **Providers > Credentials** tab

MY DASHBOARD CONSUMERS PROVIDERS INCIDENTS CLAIMS

A TEST Provider (10002)

Workers Services Provider ID Numbers Contracts Bills Linked Providers Aliases

Providers Divisions Forms Enrolments Authorizations Notes **Credentials** EW

8. Select the license added in the [Add License Information](#) section from the list.

9. Update the following fields:

- a. "Original Date of Issuance" = Change to date that ROM denied
- b. "Date of Renewal" = Leave blank
- c. "Effective Date" = Change to date that ROM denied
- d. "Expiration Date" = Change to date that ROM denied
- e. "Less than One Year" = Leave blank
- f. "License Duration" = Won't be populated
- g. "Comment" = ROM Denied Initial License – Date of Denial
- h. "Status" = Closed
- i. "QA Workstream Worker" = Does not need to be changed

License Details	
Credential Type *	License
License Type *	Group Home
License Number *	586974
Original Date of Issuance *	10/20/2023
Date of Renewal/Subsequent License	
Effective Date *	10/20/2023
Expiration Date *	10/20/2023
Less than One Year	<input type="checkbox"/>
Comment	ROM Denied Initial License - 10/20/23
Status	Closed
Reason	Initial
QA Workstream Worker	Reed, Monica
	<input type="button" value="Lookup"/> <input type="button" value="Clear"/>

10. When finished, click **File > Save and Close License Details**.



The Licensing Specialist will proceed to Chapter 13 to initiate the PAARF process.

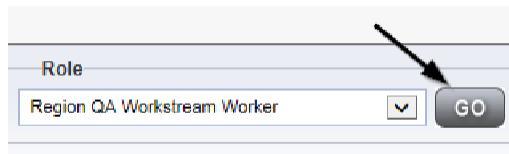
NEW! As Needed: Abandoned and Denied Applications – End iConnect Access to Placeholder Parent Provider Record.



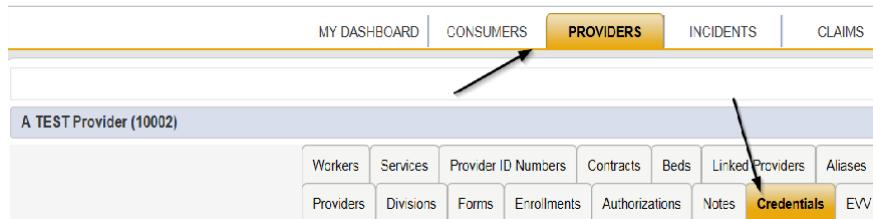
If a Placeholder Parent Provider record was created and the provider has not pursued a MWSA and the License is Abandoned or Denied, region staff will end the iBudget credential record and close the Placeholder Parent Provider record.

In addition, APD staff will deactivate the worker records within the Placeholder Parent Provider record.

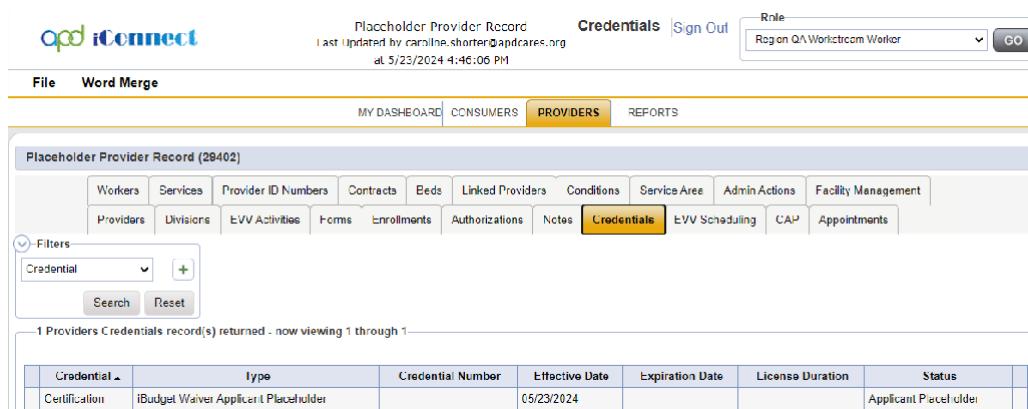
1. Set "Role" = Region QA Workstream Worker then click **Go**.



2. Navigate to the Placeholder Parent Provider record > **Credentials** tab



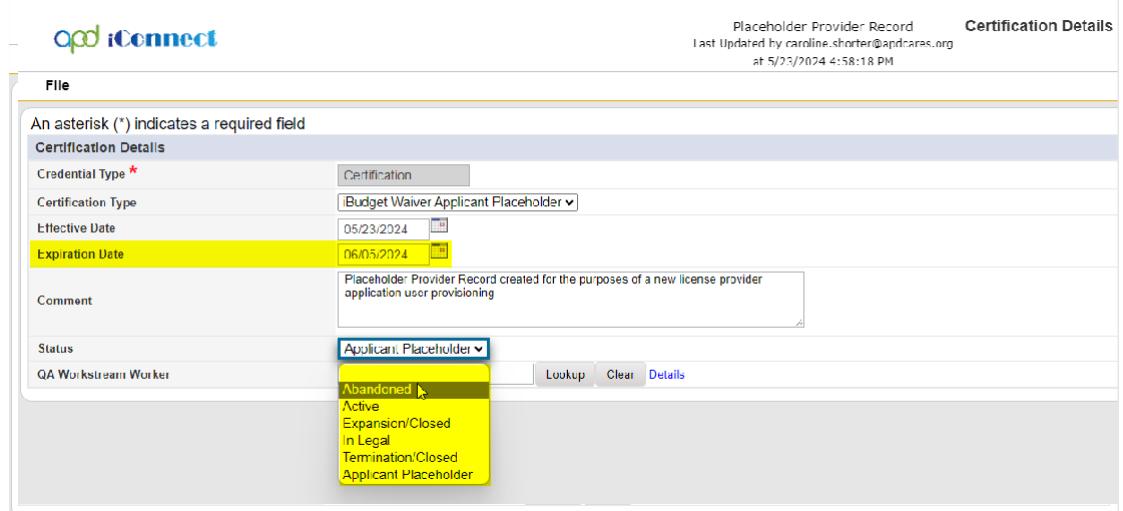
3. Locate the iBudget credential record in the List View Grid.



4. Update the following fields:

- a. "Expiration Date" = Enter Date of denial/abandonment

b. “Status” = Select Applicable Status (Abandoned or Termination/Closed)



An asterisk (*) indicates a required field

Certification Details

Credential Type *****

Certification Type

Effective Date

Expiration Date

Comment

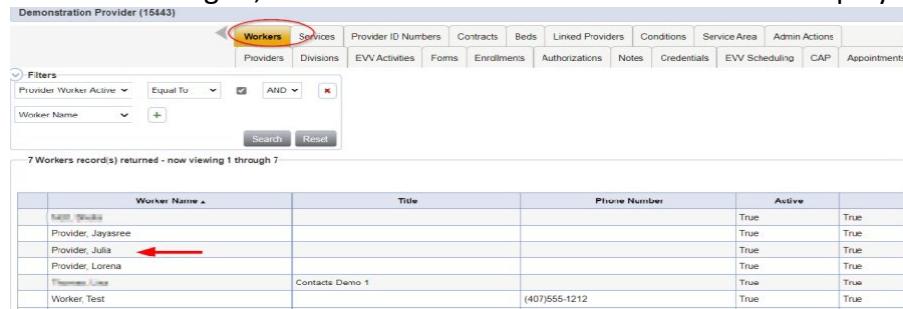
Status

QA Workstream Worker

Abandoned

Applicant Placeholder
Active
Expansion/Closed
In Legal
Termination/Closed
Applicant Placeholder

5. When finished, click **File > Save and Close**
6. Navigate to the Placeholder Parent provider > **Workers** tab.
7. In the list view grid, find and click on the name of the former employee.



Demonstration Provider (15443)

Workers

Filters

Provider Worker Active

Worker Name

7 Workers record(s) returned - now viewing 1 through 7

Worker Name	Title	Phone Number	Active	True
Provider, Julia			True	True
Provider, Jayasree			True	True
Provider, Julia			True	True
Provider, Lorena			True	True
Thomas, Luis	Contacts Demo 1		True	True
Worker, Test		(407)555-1212	True	True

8. This will open the Worker Details page
 - a. Check the “Exclude” checkbox.
 - b. When Finished File > Save and Close Worker

apd iConnect

File

Workers

Provider ID: 4296

Provider: Julia

Title:

Business Address: 123 Business Ave.

City: MIAMI

State: FL

Zip Code: 33184

Business Phone:

Home Phone:

Extension:

Cell Phone: (305)555-1212

Fax Number:

SSO Email: demo@email.com

Business Email:

Start Date:

End Date:

Designated Zip Code(s):

Designated Counties:

Supervisor: Buck, Jennifer

Primary Provider: Demonstration Provider

Exclude: Check the "Exclude" checkbox

Active:

9. 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

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

	Worker Name	Title	Phone Number
	Julia Provider	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-EVW, Test		

NEW! As Needed: End iConnect Access to Applicant Record by updating the Applicant License Record to Closed



If the license application is abandoned by or withdrawn by a provider, the end dating of the license credential on the applicant record will remove that Applicant License record from the provider's access.

This step of ending a Placeholder Provider Record, must also be completed for Applicant Licenses abandoned or withdrawn.

1. Set "Role" = Region QA Workstream Worker then click **Go**.

A screenshot of a search interface. At the top, there is a dropdown menu labeled 'Role' with the option 'Region QA Workstream Worker' selected. Below the dropdown is a 'GO' button. An arrow points from the text in step 1 to this 'GO' button.

2. Navigate to the **Providers** chapter and enter the Provider's name in the Quick Search filter and click **Go**

A screenshot of the iConnect software interface. At the top, there is a 'File' menu and a 'Quick Search' bar with three fields: 'A Test Provider' in the first field, 'Providers' in the second, and 'Provider Name' in the third. Below the search bar is a navigation bar with tabs: 'MY DASHBOARD', 'CONSUMERS', 'PROVIDERS' (which is highlighted in yellow), 'INCIDENTS', 'CLAIMS', and 'SCHEDULER'. An arrow points from the text in step 2 to the 'PROVIDERS' tab. Another arrow points from the 'Quick Search' bar to the search field.

3. Navigate to the **Providers** chapter and enter the **Child** Provider's name in the Quick Search filter and click **Go**.

4. The Provider's record will display. Navigate to the **Providers > Credentials** tab

A screenshot of the iConnect software interface showing a provider record for 'A TEST Provider (10002)'. The 'PROVIDERS' tab is highlighted in yellow. Below the provider name, there is a navigation bar with tabs: 'Workers', 'Services', 'Provider ID Numbers', 'Contracts', 'Beds', 'Linked Providers', 'Aliases', 'Providers', 'Divisions', 'Forms', 'Enrolments', 'Authorizations', 'Notes', 'Credentials' (which is highlighted in yellow), and 'EVV'. An arrow points from the text in step 4 to the 'PROVIDERS' tab. Another arrow points from the navigation bar to the 'Credentials' tab.

5. Locate the Applicant License in the List View Grid.
6. Update the following fields:
 - a. "Expiration Date" = Enter Date of denial/abandonment
 - b. "Status" = Closed

apd iConnect 18919 Group Home Record **License Details**
5/23/2024 5:19 PM

File

An asterisk (*) indicates a required field

License Details	
Credential Type *	License
License Type *	Group Home
License Number *	SCR-APPL-73257
Original Date of Issuance *	05/23/2024
Date of Renewal/Subsequent License	MM/DD/YYYY
Effective Date *	05/23/2024
Expiration Date *	06/05/2024
Less than One Year	<input type="checkbox"/>
Comment	License Record created for the purposes of a new license provider application user provisioning
Status	Closed
Reason	Initial
QA Workstream Worker	Shorter, Caroline
	Lookup Clear Details

7. When finished, click **File > Save and Close License Details**