

DDMC Caseload Report

Introduction

The Agency for Persons with Disabilities (APD) has clients enrolled in the Developmental Disability Managed Care (DDMC) pilot program. The DDMC care coordinator and their supervisor(s) will be able to generate a report of their caseloads within iConnect. The DDMC Caseload Report will include clients' demographic information, including their legal representative, if applicable.

<u>REMINDER:</u> Personal Health Information (PHI) will be pulled when exporting this report. It is the responsibility of all iConnect users that their systems follow all HIPAA requirements.

The following APD Staff Roles will have access to this report: APD Admin APD Main Region QA Workstream Lead Region QA Workstream Worker ROM/Deputy ROM State Office Process Owner State Office Worker Tier 1 Help Desk Tier 2 Help Desk

Pulling the DDMC Caseload Report

ood :Connect

1. To begin, log into iConnect and set Role = **<u>DDMC</u>**. Click **Go**.



2. On **My Dashboard**, navigate to the **Reports** menu dropdown and Select **DDMC Caseload Report**.

File	Reports		
	DDMC Medicaid Waiver Eligibility Worksheet Due	Quick Search	1
	DDMC Support Plan Due	Consumers	✓ Li
	DDMC Caseload Report		
			IY DASHBOARD
		CONSUMERS	

- 3. A new window opens with the available search criteria. Fill out the search criteria.
 - a. In the Primary Worker Name dropdown, select the name(s) needed.





b. In the Supervisor Name dropdown, select the name(s) needed.



4. Click **View Report** to execute the search.



- 5. A report will generate. The report can be viewed on the screen or exported.
- 6. To export the report, go to the caret next to the Save icon.



a. Select Excel.



b. The Excel report will download. Click the report from the computer's downloads.



c. Once the Excel report displays, click the **Enable Editing** button.



File	Home	Insert	Page Layout	Formulas	Data	Review	View	Automate	Help	Acrobat				🖻 Share 🕯
0	PROTECTED	VIEW <u>Be</u>	careful—files from	n the Internet	can conta	in viruses.	Unless you	u need to edit,	it's safer i	to stay in Protected	I Viev Enable E	diting		×
A1	A1 \checkmark : $\times \checkmark f_x \checkmark$ DDMC Caseload Report													
	А		В	С	D		E		F	G	Н	I	J	
1 C	DDMC Caseload Report													
3 Report Run Time :2/10/2025 6:01:46 PM														

7. Review/filter report as needed. Utilize the <u>How to Add Filters to</u> <u>iConnect Reports Job Aid</u> for additional assistance in filtering an iConnect report.