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.

REMINDER: 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
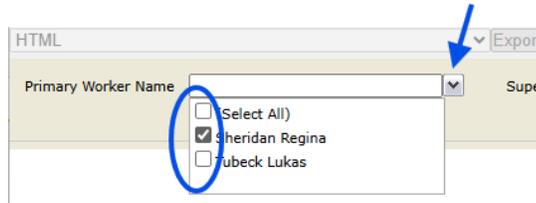
Pulling the DDMC Caseload Report

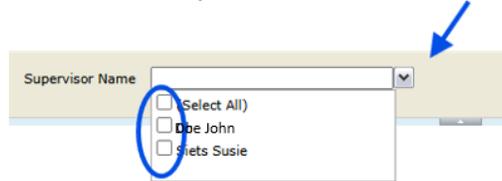1. To begin, log into iConnect and set Role = **DDMC**. Click **Go**.

2. On **My Dashboard,** navigate to the **Reports** menu dropdown and Select **DDMC Caseload Report.**
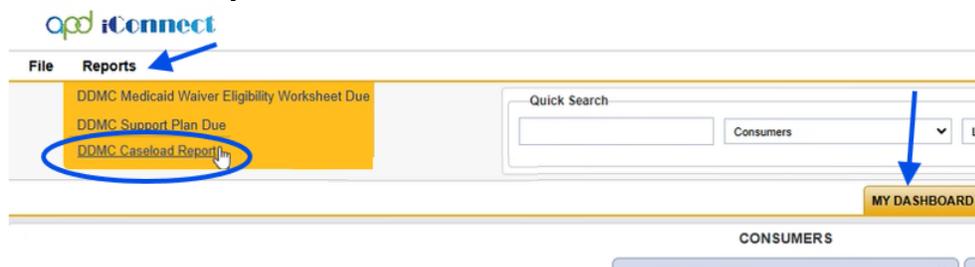
3. A new window opens with the available search criteria. Fill out the search criteria.
   a. In the Primary Worker Name dropdown, select the name(s) needed.

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

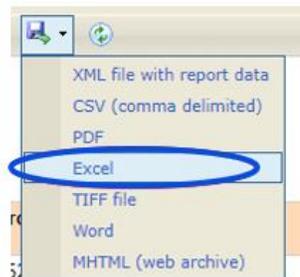4. Click **View Report** to execute the search.

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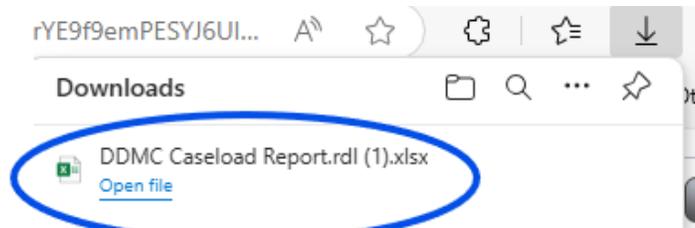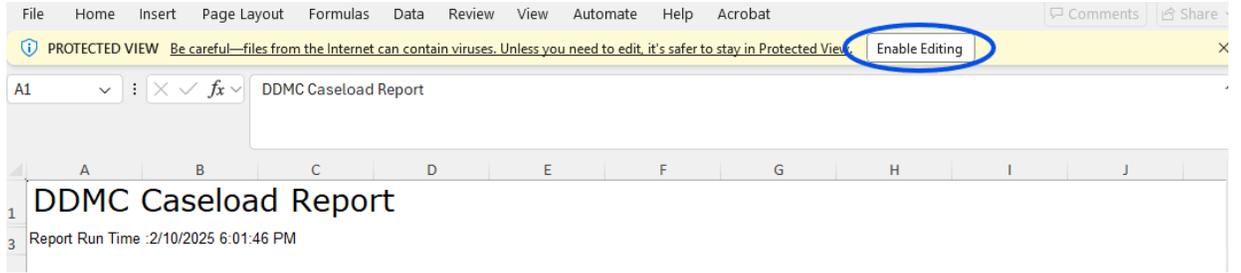6. To export the report, go to the caret next to the Save icon.

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.

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