



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

iConnect  
DDMC Training Manual Version 3  
UPDATED: 05/29/2025

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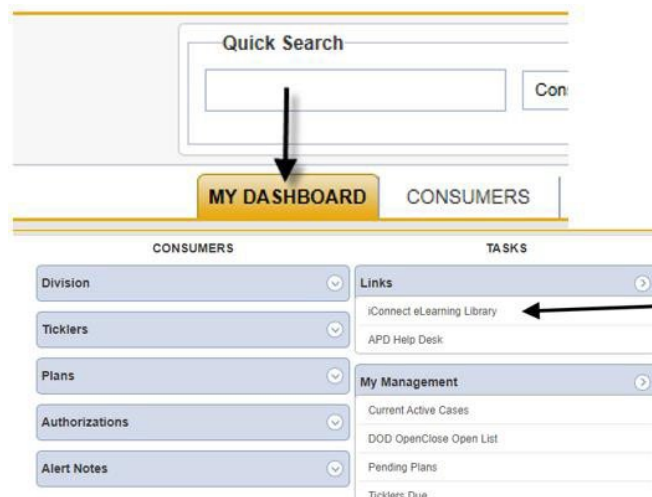
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## Introduction | Case Management Module Training Guide

### Preceding Training Guide

- This training manual and links to FAQ's for user self-help are available via My Dashboard > My Links > iConnect eLearning Library.



### Summary

This training guide covers all aspects of clients enrolling into the DDMC Pilot Program along with documenting the Person-Centered Support Plan, HCBS Waiver Eligibility Worksheet and maintaining the client's record.

### *Learning Objectives for Case Management Module Training Guide:*

- ✓ Develop a working knowledge of the various components of a consumer record, and the navigation thereof.
- ✓ Understand the function of roles within iConnect and how to use them with an established workflow.
- ✓ Understand how to complete tasks associated with the user's daily job responsibilities.

## **Chapter 1 | Developmental Disabilities Managed Care (DDMC) Pilot Program Enrollment**

### **Introduction**

This Chapter outlines the workflow from the point in time when a client on Pre-Enrollment is approved for iBudget Waiver enrollment or the Developmental Disabilities Managed Care (DDMC) Pilot Program.

The process begins with steps completed externally to iConnect when the APD State Office team evaluates and makes a determination of Pre-Enrollment to iBudget Waiver Enrollment Eligibility.

APD State Office will mail interest letters to eligible APD clients (combination interest letters for Pre-Enrollment clients in categories 3, 4, and 5, who reside in the pilot counties and who are eligible for enrollment in the Managed Care Pilot and iBudget Waiver, iBudget Waiver letters for individuals in categories 3, 4, 5 statewide and pilot interest letters for individuals who are in Pre-Enrollment category 6 in pilot counties). Pilot counties include Hardee, Hillsborough, Miami-Dade, Manatee, Monroe, Polk and Highlands. Copies of these interest letters will be uploaded to a Note in the client's record within iConnect.

Regional Pre-Enrollment staff will identify individuals who are approved for iBudget Waiver enrollment in categories 1 and 2 in pilot counties that are age 18 or older. Once identified a notification is sent outside iConnect via the APDEnrollments inbox. State Office monitors the inbox to process interest forms, respond to inquiries, and region's requests to send interest letters to individuals in categories 1 and 2.

State Office staff will mail combination interest letters to individuals in categories 1 and 2 that are 18 years old or older and reside in pilot counties. State Office staff will update the client's iConnect record by uploading the letter to a Note and updating their Pre-Enrollment status from "2 – Waiting" to "3 – Offered".

The individual submits the interest form by mail or email to the APDEnrollments inbox.

State Office will date stamp interest forms for individuals accepting the offers and enter time of receipt on the master spreadsheet along with the individual's response (acceptance or decline).

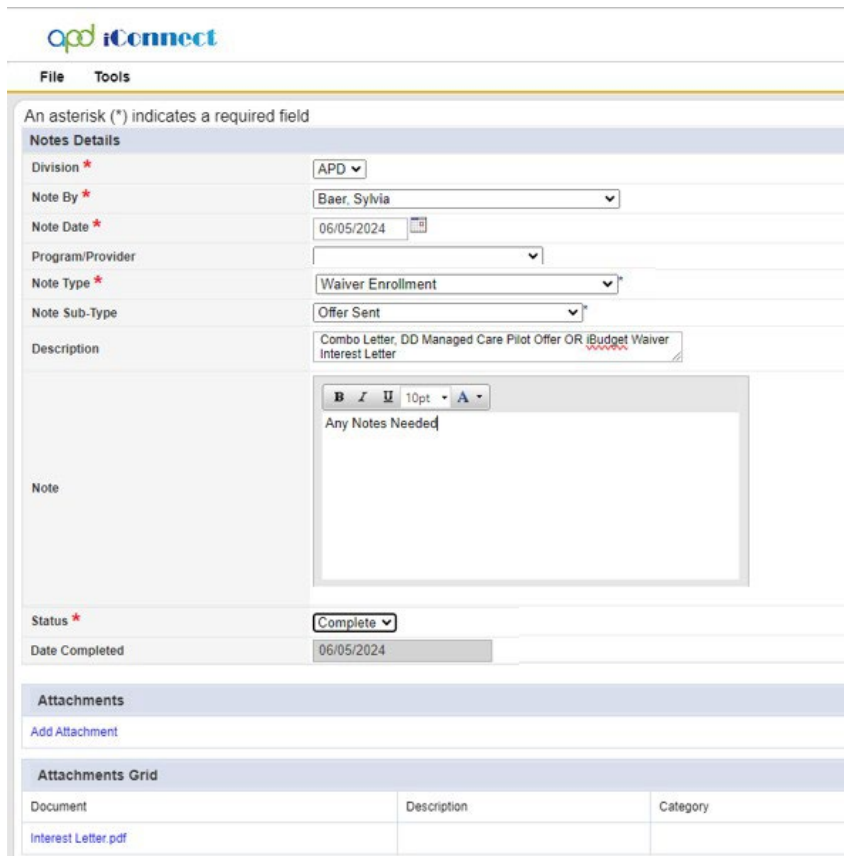
## Chapter 2 | iConnect Steps

### Document Combo Letter Sent /Update Pre-Enrollment Record

#### Role: State Office Worker or State Office Enrollment

State Office will monitor the APDEnrollments inbox daily to identify clients who need a “Combo Letter” mailed out, prepare combo letter packet and mail out immediately.

1. State Office will upload each interest letter (those mailed out by State Office) to the client's record in iConnect by adding a new Note record and updating the following fields:
  - a. Division = APD
  - b. Note Type = Waiver Enrollment
  - c. Note Sub-Type = Offer Sent
  - d. Description = Combo Letter, DD Managed Care Pilot Offer OR iBudget Waiver Interest Letter
  - e. Status = Complete
  - f. Attachment = Copy of Offer Letter



An asterisk (\*) indicates a required field

**Notes Details**

Division \*

Note By \*

Note Date \*

Program/Provider

Note Type \*

Note Sub-Type

Description

Note 

B I U 10pt A
   
 Any Notes Needed

Status \*

Date Completed

**Attachments**

[Add Attachment](#)

**Attachments Grid**

Document	Description	Category
<a href="#">Interest Letter.pdf</a>		

2. When finished, click **File > Save and Close Notes**

3. Navigate to the client's **Pre-Enrollment** tab in iConnect, open the existing Pre-Enrollment record and update the following fields:
  - a. Pre-Enrollment Status = 3-Offered
  - b. Pre-Enrollment Status Date = enter date

1 Consumers Pre-Enrollment record(s) returned - now viewing 1 through 1

Pre-Enrollment Status	Pre-Enrollment Category	Pre-Enrollment Category Date	Days in Pre-Enrollment	Reason for Closure
2 - Pending	2	06/06/2024	86	

An asterisk (\*) indicates a required field

**Pre-Enrollment**

Pre-Enrollment Category: 2

Pre-Enrollment Category Date: 06/06/2024

Pre-Enrollment Status: 3 - Offered

Pre-Enrollment Status Date: 01/01/2024

Date Placed in Pre-Enrollment: 03/12/2024

Days in Pre-Enrollment: 86

Reason for Closure: [dropdown]

Closure Date: MM/DD/YYYY

4. When finished, click **File > Save Pre-Enrollment** and **File > Close**

## Document Interest Form Received

**Role: State Office Worker or State Office Enrollment**

As the interest forms are **received**:

1. Date stamp all acceptance forms with **postmark date and time 8:00am** or **date/time of email** and enter the **postmark date or email/date time** the interest forms were received in the Master Tracking Spreadsheet for both, the DD Managed Care Pilot and the iBudget Waiver.
2. If the client **accepts** either one of the programs, navigate to the **Notes** tab in the client's record in iConnect. [\(If the client declines, proceed to step 7.\)](#)

**Add a new Note** and update the following fields:

- a. Division = APD
- b. Note Type = Waiver Enrollment
- c. Note Sub-Type = Offer Response – Accepted
- d. Description = DD Managed Care Pilot Interest OR iBudget Waiver Interest

- e. Status = Complete
- f. Upload the client's acceptance document and click **File > Save Notes**

File Tools

An asterisk (\*) indicates a required field

**Notes Details**

Division \*

Note By \*

Note Date \*

Program/Provider

Note Type \*

Note Sub-Type

Description

Note

Status \*

Date Completed

**Attachments**

[Add Attachment](#)

**Attachments Grid**

Document	Description	Category	Action
<a href="#">OfferLetter.docx</a>			<a href="#">Remove</a>

3. Verify that the Questionnaire for Situational Information (QSI) is current.
  - a. If the QSI is current, proceed to the next step.
  - b. If there is no QSI or the QSI was completed more than 3 years ago, notify the Regional Clinical supervisor by email, request an expedited QSI evaluation, and enter the date the request for the QSI was made in the Master Tracking Spreadsheet.
  - c. Once the QSI is complete, the Regional Clinical supervisor will respond to the original email to notify State Office that the QSI is complete. State Office will enter the QSI completion date in the Master Tracking Spreadsheet and proceed to the next step.
4. Verify completion of the Home and Community-Based Services (HCBS) Waiver Eligibility Worksheet (coordinate completion with the Regional Pre-Enrollment Workstream supervisor, if needed) and track the completion in the Master Tracking Spreadsheet.
5. Verify that the client has Medicaid.
  - a. If the client already has Medicaid, proceed to the next step.
  - b. If the client needs to apply for Medicaid, notify the Regional Pre-Enrollment Workstream supervisor by

email and request their assistance with guiding the client /legal representative through the Medicaid application process and sending the Form 2515 to DCF as part of this process. Notify APD State Office immediately when the client has been approved for Medicaid.

- c. State Office will provide DCF with a list of clients applying for Medicaid for assistance, as needed, and will track the Medicaid eligibility process in the Master Tracking Spreadsheet.
  - d. Once the client has obtained Medicaid, then proceed to the next step.
6. Navigate to the client's **Pre-Enrollment** tab and update the Pre-Enrollment Status to "7-Removed PR" ("PR" = "Pilot Recipient") (Do not change if person requests iBudget Waiver enrollment. This only applies to persons interested in enrolling in the DD Managed Care Pilot.)

7. If the client **declines** either one of the programs:
- a. Navigate to the **Notes** tab in the client's record in iConnect record, **add a new Note** and update the following fields:
    - i. Division = APD
    - ii. Note Type = Waiver Enrollment
    - iii. Note Sub-Type = Offer Response – Declined
    - iv. Description = DD Managed Care Pilot Declined or iBudget Waiver Declined
    - v. Note = Explain client's reason for declining the offer and indicate whether the client wishes to remain in Pre-Enrollment status.
    - vi. Status = Complete
    - vii. When finished, click **File > Save and Close Note**

- b. If the client elects to remain in Pre-Enrollment, navigate to the **Pre-Enrollment** tab, open the existing Pre-Enrollment record, and update the following fields:
    - i. Pre-Enrollment Status = 2-Waiting
    - ii. When finished, click **File > Save Pre-Enrollment** and **File > Close Pre-Enrollment**

- c. If the client elects to be removed from the Pre-Enrollment, notify the Regional Pre-Enrollment Workstream Lead by email and request that they follow established closure procedures.

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Every interest letter response will be handled on a first-come-first-serve basis until the maximum number of enrollments has been reached. State Office staff will keep a record of the order in which they were received as described above for possible enrollment in the DD Managed Care Pilot or the iBudget Waiver.

For individuals who meet the enrollment criteria for the DD Managed Care Pilot and are identified as such on the Pre-Enrollment record, the Data Unit will include all clients with a Pre-Enrollment Status = “7-Removed PR” in their daily file to the Florida Agency for Health Care Administration (AHCA) as an indication that those clients meet the criteria for enrollment in the DD Managed Care Pilot on the first of the next month.

AHCA will send an auto assignment letter to the client once they are officially enrolled onto the pilot program and AHCA will provide APD State Office with the names of all clients enrolled in the DD Managed Care Pilot on a monthly basis.

### **DDMC Coordinator is Assigned to Client's Record**

**Role: Role: State Office Worker or State Office Enrollment**

Once a DDMC Coordinator is assigned to a client, State Office will need to add a Program.

1. Navigate to the client's record and click the **Program** tab. Go to **File** and select **Add Program**. Update the following fields:
  - a. Create Date = enter date
  - b. Program = DDMC
  - c. Disposition = Enrolled
  - d. Disposition Date = enter date
  - e. Enrollment Type = Enrolled in DDMC
  - f. Primary Worker = choose the DDMC Coordinator
  - g. Program Begin Date = enter date
  - h. **File > Save and Close Program**

File Tools	
An asterisk (*) indicates a required field	
Division *	APD ▼
Referral Date	MM/DD/YYYY
Create Date *	06/01/2024
Program *	DDMC ▼ <a href="#">Details</a>
Disposition *	Enrolled ▼
Disposition Date *	06/01/2024
Enrollment Type *	Enrolled in DDMC ▼
Primary Worker *	WSC, Regina <a href="#">Lookup</a> <a href="#">Clear</a> <a href="#">Details</a>
Program Begin Date *	06/01/2024
Expected Deactivated Date	MM/DD/YYYY
Comments	
LOC completed prior to enrollment	<input type="checkbox"/>

## Role: State Office Enrollment

Once the client's record has been updated, the State Office Enrollment will update the Division tab of the client's record.

2. Navigate to the client's record and click the **Division** tab and select the Division in the list view grid. Update the following fields:
  - a. Primary Worker = DDMC Coordinator's name
  - b. Secondary Worker = Region Pre-Enrollment Lead's name
  - c. Disposition = APD Eligible – DDMC
  - d. Disposition Date = enter date
  - e. **File > Save and Close Divisions**

An asterisk (*) indicates a required field	
<b>Events</b>	
Division *	APD
Disposition *	APD Eligible - DDMC ▼
Disposition Date	06/19/2024
Open Date	05/25/2010
Data Entry Date	
Primary Worker *	Baer, Sylvia <a href="#">Lookup</a> <a href="#">Clear</a> <a href="#">Details</a>
Secondary Worker	Nipper, Susan <a href="#">Lookup</a> <a href="#">Clear</a> <a href="#">Details</a>
Application Received Date *	04/09/2024
Interested in ICF/IID	▼
Age Category at Time of Application *	6 and Above ▼
Application Pended Due Date	MM/DD/YYYY
Eligibility Documentation Complete Date	MM/DD/YYYY
<b>Referral Source</b>	

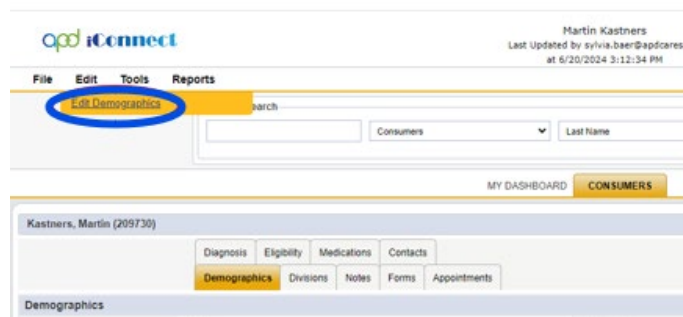
## UPDATED: Chapter 3 | Demographics and Contacts

The Care Coordinator must ensure that the Consumer Demographics within iConnect are up to date. The Care Coordinator is responsible for entering, updating and ensuring the accuracy of all demographics and recipient-related information pertinent to the recipient in iConnect. Information includes recipient address, type of residence, living setting, legal representative name, and address (if applicable), employment information and type of benefits received.

The Care Coordinator must update this information within 7 days of becoming aware of the change.

### Updating Basic Demographics

1. To begin, log into iConnect and set Role = **DDMC**. Click **Go**
2. Navigate to the Consumer Demographics record and click **Edit > Edit Demographics**



3. The Consumer Demographics Details page is displayed. Update the following fields, as needed:
  - a. Salutation = select the client's salutation (Dr., Miss, Mr., Mrs., or Ms.)
  - b. Alias = add the client's alias when applicable
  - c. Title = add the client's title when applicable
  - d. Gender\* = select male or female
  - e. Race = select the client's race when known
  - f. Ethnicity = select the client's ethnicity when known
  - g. Competency\* = select the client's competency
    - i. Has been Adjudicated Incapacitated
    - ii. Has Capacity
    - iii. Incompetent, Guardian Available
    - iv. Information not Available
    - v. Legally Competent, Cannot Give Consent
    - vi. Legally Competent/ Guardian Advocate Appt.
    - vii. Minor
    - viii. Minor Adjudicated Dependent

- ix. Minor, Not Adjudicated Dependent, Parent Available
- x. Minor, Not Adjudicated Dependent, Parents Unknown
- h. Marital Status\* = select the client's marital status (Divorced, Married, Separated, Single/Never Married or Widowed)
- i. Living Setting\* = select the client's living setting (see list of definitions in [Living Settings Defined](#))
- j. Medicare ID (required\* if client has Medicare)
- k. Medicare Type (required\* if client has Medicare)
- l. Demographics Verified On\* = enter date the Demographics were verified.

**\*\* Best Practice \*\*** If there are no changes to the above listed Demographics, update the "Demographics Verified On" field at the time of the Support Plan to acknowledge that demographics are current and accurate.

Demographics

Last Updated by [\[User Name\]](#) at 2/28/2022 12:16:13 PM

File Tools Reports

**Demographics**

Consumer Addresses

Consumer Phones

Consumer Emails

Consumer Identifiers

**Basic Demographics**

Salutation

Last Name \*

First Name \*

Consumer Photo

Middle Name  500 characters remaining

Suffix

Alias

Title

Date of Birth \*  01/01/1990

Age  32.1

Date of Death  02/16/2022

DOD Action

DOD File Number

Vital Statistics Cause of Death

Gender \*  Male

Race  Other

Ethnicity  USA

Suspected Developmental Disability  Autism  
Intellectual Disability  
Unknown  
Prader-Willi Syndrome  
Spina Bifida  
Down Syndrome  
Phelan McDermid Syndrome

Competency \*  Has Capacity

Marital Status  Single/Never Married

Living Setting  Family Home

Referral Source  School

SSN \*  111-11-1111

Medicaid ID  XXXXX

Medicare ID

Medicare Type

ABC PIN

CBC Flag ☐

Demographics Verified On  07/19/2022

4. Proceed to the next section to update the client's contact information. If no additional information is needed go to **File > Save and Close Demographics**

### Updating Consumer Contact Information (ie. Addresses)

5. If contact information needs to be updated, the Care Coordinator must delete the existing address and use all 6 clear buttons to remove existing data.

Contact Information	
CASS Validation	
Address Type *	Residence Address
Address *	
Address 2	
City *	
State *	
Zip Code *	
County *	
Field Office *	
Region *	

6. Update the following fields:
  - a. Address Type = The "Residence Address" must always appear here for ALL clients (waiver, pre-enrollment, DDMC Managed Care Pilot Program or other active) and must reflect the individual's physical address. Allow iConnect to auto-populate as indicated. ([For further instructions on how to fill out this section for clients without a permanent "Residence Address" \(DDDP, ICF, jail, etc.\) proceed to the "As Needed: Individuals without a Residential Address."](#))
  - b. Address = current residential address for client (use USPS standard Addresses, for ex. 1234 Felper Rd. or 43210 W. End Ave.)
  - c. Address 2 = leave blank unless Apt. or Suite is necessary
  - d. Skip to Zip Code = type in current zip code and select the zip code in the selection menu when it appears

**Contact Information**

CASS Validation

Address Type \* Residence Address

Address \* 400 W Robinson St

Address 2

City \*  Clear

State \*  Clear

Zip Code \* 32801 Clear

County \*  Clear

Field Office \*  Clear

Region \*  Clear

Main Phone (555)555-1212

Please wait...  
32801  
Items 1-1 out of 1

- e. The following will auto-populate after entering the zip code. Verify that the information is accurate.
- City
  - State
  - County
  - Field Office
  - Region

**Contact Information**

CASS Validation

Address Type \* Residence Address

Address \* 400 W Robinson St

Address 2

City \* ORLANDO Clear

State \* FL Clear

Zip Code \* 32801 Clear

County \* ORANGE Clear

Field Office \* 07 Clear

Region \* CENTRAL Clear

\*\*\* Allow time for the address utility to provide the selection. Do not override the system. \*\*\*

- Main Phone = current phone number
- Business Phone = as applicable
- Extension = as applicable
- Cell Phone = current phone number
- Fax Number = as applicable
- Email = current email address
- Verified = click Verify

Contact Information	
CASS Validation	
Address Type *	Residence Address
Address *	1313 N. Tampa St.
Address 2	
City *	TAMPA
State *	FL
Zip Code *	33602
County *	HILLSBOROUGH
Field Office *	23
Region *	SUNCOAST
Main Phone	(813)123-4567
Business Phone	
Extension	
Cell Phone	(813)987-6543

7. This is a valid USPS address so the record updates as valid and the date validated as today.

Contact Information	
CASS Validation	
Address Type *	Residence Address
Address *	1313 N. Tampa St.
Address 2	
City *	TAMPA
State *	FL
Zip Code *	33602
County *	HILLSBOROUGH
Field Office *	23
Region *	SUNCOAST
Main Phone	(813)123-4567
Business Phone	
Extension	
Cell Phone	(813)987-6543
Fax Number	
Email	email@email.com
Address Valid	<input checked="" type="checkbox"/>
Date Address Validated	07/19/2022

8. Proceed to the next section to update the client's Physical Description fields. If no additional information is needed go to **File > Save and Close Demographics**

## Updating Physical Description Fields

9. Update the following fields:
- Written Language
  - Spoken Language

- c. Understood Language
- d. Interpreter Needed
- e. Medication Administration Capacity Date = leave blank

Date Address Validated	07/07/2021
<b>Physical Description</b>	
Written Language	English
Spoken Language	English
Understood Language	English
Interpreter Needed	<input type="checkbox"/>
Medication Administration Authorization Date	MM/DD/YYYY

10. Proceed to the next section to update the client's Employment fields. If no additional information is needed go to **File > Save and Close Demographics**

### Update Employment Fields

11. Benefit and employment information is required for all APD active clients (Waiver, PE, DDMC Managed Care Pilot, and other active). Update the following fields:
- a. Social Security Monthly Benefit Amount
  - b. 3<sup>rd</sup> party Health Insurance? = select yes or no
  - c. Competitively Employed? = select yes or no
    - i. If yes, fill out the additional fields:
      - 1. Indicate Hire Date
      - 2. Average Monthly Earnings from Employment
      - 3. Hourly Wage
  - d. Not Employed and Wants Competitive Employment = select yes or no
    - i. If yes, fill out the additional fields:
      - 1. Phase of Employment Services Needed = Phase 1 or Phase 2
      - 2. Referred to VR? = select yes or no
        - a. If yes, fill out the additional fields:
          - i. Date of VR Referral
          - ii. VR Response

Employment	
Social Security Monthly Benefit Amount	\$800.00
3rd Party Health Insurance?	No ▼
Competitively Employed? *	Yes ▼
Indicate Hire Date	08/01/2023
Average Monthly Earnings from Employment *	\$900.00
Hourly Wage *	\$13.00
Sheltered Workshop Below Minimum Wage?	▼
Not Employed and Wants Competitive Employment? *	No ▼
Phase of Employment Services Needed	▼

12. Proceed to the next section to update the client's mailing address, if their mailing address is different than their residence. If no additional information is needed go to **File > Save and Close Demographics**

### As Needed: Adding/Updating the Mailing Address

1. If a client's mailing address is different than the residence, an additional address must be included within the Consumer's Demographics. Navigate to the client's record and go to **File > Edit Demographics**. Click **Consumer Address** to open a list view grid of address listed for the individual.
2. To enter the Legal Representatives,' contact information proceed to ["As Needed Adding Legal Representatives into Contacts Tab" section.](#)

File 7/19/2022 11:17 AM Consumer Addresses

Demographics Filters Search Reset

Consumer Address

Consumer Phones

Consumer Emails

Consumer Identifiers

1 Consumer Addresses record(s) returned - now viewing 1 through 1

Address	City	State	Zip code	Active	Primary	Address Type
1313 N. Tampa St.	TAMPA	FL	33602	Yes	Yes	Residence Address

First Previous Records per page: 15 Next Last

3. The Address page is displayed. Update the following fields as needed:
  - a. Address Type = select Mailing Address
  - b. Address = current mailing address for client
  - c. Address 2 = leave blank unless Apt. or Suite is necessary
  - d. Skip to Zip Code and enter the current zip code. Select the zip code that appears in the selection box.

Please wait...

32801

Items 1-1 out of 1

- e. The following should auto-populate after entering the zip code. Verify that the information is accurate.
  - i. City = current city
  - ii. State = current state

\*\*\* Allow time for the address utility to provide the selection. Do not override the system. \*\*\*

- f. Start Date = start date of mailing address
- g. End Date = as applicable
- h. Active = check if Active
- i. Comments = as needed
- j. Address Valid

The screenshot shows the 'Address' form in the DDMC iConnect system. The 'Consumer Address' section is active. The 'Address Type' is set to 'Mailing Address'. The 'Address' field contains '4202 E. Fowler Ave.'. The 'City' is 'TAMPA', 'State' is 'FL', and 'Zip Code' is '33620'. The 'Start Date' is '07/01/2022'. The 'Active' checkbox is checked. The 'Address Valid' checkbox is unchecked. The 'Date Address Validated' field is empty. A blue circle highlights the 'Verify' button next to the zip code field.

4. This is a valid USPS address so the record updates as valid and the date validated as today.
5. Once completed navigate to **File > Save and Close**.

The screenshot shows the 'Address' form in the DDMC iConnect system after the address has been verified. The 'Address Valid' checkbox is now checked. The 'Date Address Validated' field is now '07/19/2022'. The 'Verify' button is now green and labeled 'Verified'.

\*\*\* To deactivate a mailing address, navigate to the Consumer Addresses bookmark and uncheck the Active box. Once completed, go to File and select Save and Close. \*\*\*

## As Needed: Adding Legal Representatives into Contacts Tab

1. If the client has a legal representative or if there is a change in the legal representative, the Care Coordinator will make the necessary updates in iConnect. Navigate to the client's record and click the **Contacts** tab.

apd iConnect

Martin Kastners  
Last Updated by sylvia.baer@apdcares.org  
at 6/20/2024 3:12:34 PM

Contacts | Sign Out

Role  
DDMC

File Tools Ticklers

Quick Search

Consumers Last Name GO

ADVANCED SEARCH

MY DASHBOARD CONSUMERS

Kastners, Martin (209730)

Diagnosis Eligibility Medications **Contacts** Demographics Divisions Notes Forms Appointments

Filters

Active Equal To Yes AND

Relation ID +

Search Reset

3 Consumers Contacts record(s) returned - now viewing 1 through 3

Relation ID	Primary Relationship	Last Name	First Name	Address	City	State	Zip	Main Phone	Email	Active	Active Military Status	Member ID
71618	Legal Representative	Dog	Jacob							Yes	No	

2. The list view grid will display showing the current contacts associated with the client's record. It is important to note that the filters feature is automatically activated, and the list view grid will only show the Active contacts. The filters can be edited as needed.

Demographics Div

Filters

Active Equal To Yes AND

Relation ID +

Search Reset

3 Consumers Contacts record(s) returned - now viewing 1 through 3

3. To add a new Contact, navigate to **File > Add New Contact Search**

apd iConnect

File Tools Ticklers

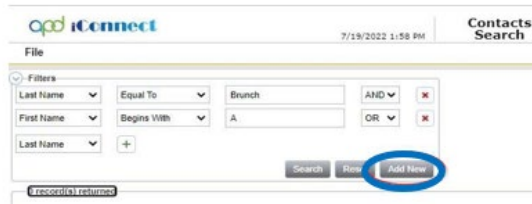
Add New Contacts Search

Print

4. iConnect requires a search to be done to avoid duplication. Enter the Last Name and First Name of the Contact. Press **Search**.



5. The user has searched for an existing contact record but did not find a match in iConnect. A new contact record will be added. Select the **Add New** button.



6. The Consumer Contacts Details page is displaced. Update the following fields as needed:
  - a. Primary Relationship = Legal Representative
    - i. Always use Legal Representative as the Primary when the client has a Legal Representative. However, if an adult client does not have a Legal Representative, please select the appropriate Primary Relationship that is **not** Legal Representative.
  - b. Relationship(s) = select one of the following applicable relationships:
    - i. Guardian
    - ii. Guardian Advocate
    - iii. Power of Attorney
    - iv. Durable Power of Attorney
    - v. Parent – If the consumer is a minor, the Primary Relationship should still be selected as Legal Representative and then Parent may be selected from the Relationship(s) menu. **Do not select this option for adults from whom the parent is not the legal representative.**
    - vi. Medical Proxy
  - c. Active Military Status
  - d. Active
  - e. Comments
  - f. Last Name
  - g. First Name
  - h. Title

- i. Legal Representative Organization
- j. Address
- k. Address 2
- l. City
- m. State
- n. Zip Code
- o. Main Phone
- p. Business Phone
- q. Extension
- r. Cell Phone
- s. Fax Number
- t. Email

**Contacts**

7/19/2022 1:59 PM

File

**Contact Detail**

Instructions: For ALL types of legal representative, the primary relationship must ALWAYS be Legal Representative of a minor so they can receive all legal notices.

Primary Relationship: Legal Representative

Relationship(s): Advocate, Attorney, Caregiver, Case Manager, CDC Representative, Circle of Supports, Client Advocate

Active Military Status: ☐

Active: ☒

Comments:

**Demographic Information**

Last Name: Abrunch

First Name: Appreciate

Title:

Legal Rep. Organization:

Address: 1313 N. Tampa St.

Address 2:

City: Tampa

State: FL

Zip Code: 33602

Main Phone: (813)444-5555

Business Phone:

Extension:

Cell Phone: (902)555-0098

Fax Number:

Email: dadmail@apd.com

7. **File > Save and Close Contacts.**
8. The Care Coordinator will then upload the legal documentation showing that the client has a legal representative if the client is not a minor or if the client is a minor, the legal representative is not their parents.
9. The Care Coordinator will navigate to the **Notes** tab of the client's record.
  - a. In the Notes tab, go to **File > Add Notes**
  - b. The Notes detail page will display. Fill out the following fields:
    - i. Division = APD
    - ii. Note By = defaults to worker's name

- iii. Note Date = today's date
- iv. Note Type = Confidential Documentation
- v. Description = "Type of Guardianship" (Legal Guardian/Advocate/etc.) Documentation
- vi. Note = as needed
- vii. Status = Complete
- viii. Attachment = add the legal documentation of the client's guardianship/legal representative. For further instructions on how to add an attachment precede to ["Notes in iConnect."](#)

An asterisk (\*) indicates a required field

**Notes Details**

Division \* APD

Note By \* Baer, Sylvia

Note Date \* 06/20/2024

Program/Provider

Note Type \* Confidential Documentation

Note Sub-Type

Description "Type of Guardianship" (Legal Guardian/Advocate/etc.) Documentation

Note

Status \* Complete

Date Completed 06/20/2024

Confidential ☐

**Attachments**

[Add Attachment](#)

**Attachments Grid**

Document	Description	Category
<a href="#">LegalDocument.pdf</a>		

### c. File > Save and Close Notes

## As Needed: Adding New Contacts into Contacts Tab

1. If the client has a new Contact, the Care Coordinator will make the necessary updates in iConnect. Navigate to the client's record and click the **Contacts** tab.

Quick Search:  Consumers Last Name  GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS

Kastners, Martin (209730)

Diagnosis Eligibility Medications **Contacts** Demographics Divisions Notes Forms Appointments

Filters: Active Equal To Yes AND Relation ID + Search Reset

3 Consumers Contacts record(s) returned - now viewing 1 through 3

Relation ID	Primary Relationship	Last Name	First Name	Address	City	State	Zip	Main Phone	Email	Active	Active Military Status
71618	Legal Representative	Dog	Jacob	123 Lane	Orlando	FL	33333	(555)555-5555		Yes	No
170908	Friend	Grav	Sarah							Yes	No

- The list view grid will display showing the current contacts associated with the client's record. It is important to note that the filters feature is automatically activated, and the list view grid will only show the Active contacts. The filters can be edited as needed.

Demographics Div

Filters: Active Equal To Yes AND Relation ID + Search Reset

3 Consumers Contacts record(s) returned - now viewing 1 through 3

- To add a new Contact, navigate to **File > Add New Contact Search**

apd iConnect

File Tools Ticklers

Add New Contacts Search

Print

- iConnect requires a search to be done to avoid duplication. Enter the Last Name and First Name of the Contact. Press **Search**.

apd iConnect

7/19/2022 1:54 PM

Contacts Search

File

Filters: Last Name Equal To Brunch AND First Name Begins With A OR Last Name + Search Reset

- The user has searched for an existing contact record but did not find a match in iConnect. A new contact record will be added. Press the **Add New** button.

The screenshot shows the 'Contacts Search' page in the iConnect system. At the top, there's a header with the 'apd iConnect' logo, the date '7/19/2022 1:58 PM', and the 'Contacts Search' title. Below the header is a 'File' section with a 'Filters' dropdown. The filters include 'Last Name' (set to 'Equal To'), 'First Name' (set to 'Begins With'), and 'Last Name' (set to '+'). There are also input fields for 'Brunch' and 'A', and buttons for 'AND', 'OR', and 'X'. At the bottom, there are 'Search', 'Reset', and 'Add New' buttons. The 'Add New' button is circled in blue.

- The Consumer Contacts Details page is displayed. Update the fields as needed.

The screenshot shows the 'Consumer Contacts Details' page in the iConnect system. At the top, there's a header with the 'apd iConnect' logo, the date '7/19/2022 1:59 PM', and the 'Contacts' title. Below the header is a 'File' section. The main content area is divided into two sections: 'Contact Detail' and 'Demographic Information'.  
  
The 'Contact Detail' section includes:  
- Instructions: For ALL types of legal representative, the primary relationship must ALWAYS be Legal (a minor) so they can receive all legal notices.  
- Primary Relationship: A dropdown menu set to 'Legal Representative'.  
- Relationship(s): A list of roles including Advocate, Attorney, Caregiver, Case Manager, CDC Representative, Circle of Supports, and Client Advocate. A 'Parent' role is also visible.  
- Active Military Status: A checkbox.  
- Active: A checked checkbox.  
- Comments: A text area.  
  
The 'Demographic Information' section includes:  
- Last Name: A text field with 'Abrunch'.  
- First Name: A text field with 'Appreciate'.  
- Title: A text field.  
- Legal Rep. Organization: A text field.  
- Address: A text field with '1313 N. Tampa St.'.  
- Address 2: A text field.  
- City: A text field with 'Tampa'.  
- State: A dropdown menu with 'FL'.  
- Zip Code: A text field with '33602'.  
- Main Phone: A text field with '(813)444-5555'.  
- Business Phone: A text field.  
- Extension: A text field.  
- Cell Phone: A text field with '(902)555-0098'.  
- Fax Number: A text field.  
- Email: A text field with 'dadmail@apd.com'.  
There are 'Clear' buttons next to the City, State, and Zip Code fields.

- File > Save and Close Contacts**

## Living Settings Defined

### Agency for Persons with Disabilities (APD) iConnect Living Settings Released 2/10/2020

Please choose the appropriate living setting in iConnect based on the definitions below.

**AHCA Licensed Adult Family Care Home:** A residential Adult Family Care Home designed to provide personal care services to individuals requiring assistance. The provider must live in the home and offers personal services for up to 5 residents.

**AHCA Licensed Assisted Living:** An Assisted Living Facility designed to provide personal care services in the least restrictive and most home-like environment. These facilities can range in size from one resident to several hundred and may offer a wide variety of personal and nursing services designed specifically to meet an individual's personal needs.

**AHCA Licensed Private ICF:** A privately owned and operated Intermediate Care Facility in Florida.

**AHCA Licensed Nursing Home:** A nursing home operated in Florida.

**APD Developmental Disabilities Center:** A public Intermediate Care Facility, owned and operated by APD, at either the Sunland Center (in Marianna) or Tacachale (in Gainesville).

**APD Developmental Disabilities Defendant Program:** A secure APD-operated residential facility (located on the grounds of Florida State Hospital in Chattahoochee or the Pathways program in Marianna) to which individuals are court-ordered for placement as a result of felony charges.

**APD Licensed Facility - Foster Home (Capacity 1-3):** An APD licensed foster home with the capacity of no more than 3 individuals.

**APD Licensed Facility - Large Group Home (Capacity 7-15):** An APD licensed group home with the capacity of 7 to 15 individuals.

**APD Licensed Facility - Residential Habilitation Center:** An APD licensed facility which includes either the Duvall

Home's Allgair Cottage in Volusia County or the United Community Options Hope Center in Dade County.

**APD Licensed Facility - Small Group Home (Capacity 4-6):** An APD licensed group home with the capacity of 4 to 6 individuals.

**DCF Licensed Home - Foster Home (Capacity 1 to 3):** A foster home licensed by DCF with the capacity of no more than 3 individuals.

**DCF Licensed Home - Small Group Home (Capacity 4 to 6):** A facility licensed by DCF with a capacity of 4 to 6 individuals.

**DCF Licensed Home - Large Group Home (Capacity 7 to 15):** A facility licensed by DCF with a capacity of 7 to 15 individuals.

**DCF Commitment Facility:** A forensic facility operated by DCF for individuals who are found incompetent to proceed on a felony offense or acquitted of a felony offense by reason of insanity, such as Florida State Hospital.

**Department of Juvenile Justice Facility:** A residential program or detention facility for youth required by the court system to stay in the care of the Department of Juvenile Justice.

**Family Home:** The primary residence occupied by the client and member(s) of the family including parents and siblings, including stepchildren, stepparents, stepsiblings and in-laws.

**Hospital – Non-Psychiatric:** A hospital placement for medical treatment.

**Hospital – Psychiatric:** A hospital placement for the purpose of treatment and the implementation of interventions to reduce symptoms of mental illness.

**Independent Living:** A client's own home where they live without Personal Supports or Supported Living Coaching.

**Jail/Prison:** Incarcerated in a state prison or county jail.

**Supported Living:** A client's own home where they live and receive Personal Supports and/or Supported Living Coaching, and that home is available for lease or sale to individuals in the community.

## As Needed: Individuals without a Residential Address

### How to add a Residence Address in iConnect for APD consumers without a Residence Address

Below are instructions on how to document residence address and “home” Region for clients who are homeless or in a different Region at DDDP, in an ICF, jail, hotel, etc. iConnect is programmed to only show a “Region” designation when there is a “Residence Address” type. In the example below, the client is at DDDP in Chattahoochee with a “Temporary Address,” but his home region is Suncoast, so DDDP cannot be designated as the “Residence Address,” or it will incorrectly designate Northwest as his home Region:

Contact Information	
Address Type	Temporary Address
Address	PO Box 1000
Address 2	Dddp
City	Chattahoochee
State	FL
Region	
Zip Code	32324

The details in the Consumer Address screen show that he has two “Temporary Addresses” (one for DDDP and one for the jail in Tampa). This client has no real residence address and no legal representative:

2 Consumer Addresses record(s) returned - now viewing 1 through 2

Address	City	State	Zip code	Active	Primary	Address Type
520 Falkenburg Road	TAMPA	FL	33619	No	No	Temporary Address
PO Box 1000	Chattahoochee	FL	32324	Yes	Yes	Temporary Address

<< First < Previous Retrieve 15 Records at a time Next > Last >>

When State Office runs reports his Region designation is blank because he does not have a “Residence Address”:

Contact Information		
Address Type	Temporary Address	County
Address	PO Box 1000	Field Office
Address 2	Dddp	Main Phone (813) 247-8300
City	Chattahoochee	Business Phone
State	FL	Cell Phone
Region		Email
Zip Code	32324	

Below are the instructions on how to document a “Residence Address” for someone who does not have one:

**For clients with no home residence address and no legal representative:**

1. Add the Regional APD address as the client's "Residence Address"
2. Update the following fields:
  - a. Address = enter the corresponding Regional Street Address
  - b. Address 2 = enter the word: "Non-Residence"
  - c. City = enter the Regional APD city
  - d. State = FL
  - e. Zip Code = "home" Region Zip Code
  - f. Main Phone = enter APD Regional office main phone
3. The correct "home" Region will show up in iConnect
4. The "Residence Address" must be updated when (or if) a client moves into a more permanent living setting (such as family home, group home, own home, supported living, etc.) in the "home" Region.

**For clients with no home residence address who have a legal representative residing in the "home" Region:**

1. Add a "Residence Address"
2. Enter the legal representative address
3. Validate address as usual
4. The correct "home" Region will show up in iConnect

**For clients with no home residence address who have a legal representative residing in another Region (or State) enter the Regional APD address as indicated in "A" above.**

**Add as many "Temporary Addresses" as necessary and mark the client's physical location as "primary."**

## Chapter 4 | Support Plan

### Introduction

The Person-Centered Support Plan (PCSP) must be created in iConnect. Based on the Consumer/Legal Representative's responses to questions in the QSI Assessment, iConnect uses Copy Shared Responses functionality to import QSI responses directly into the PCSP. The Care Coordinator will review the QSI responses and address those needs during person-centered planning.

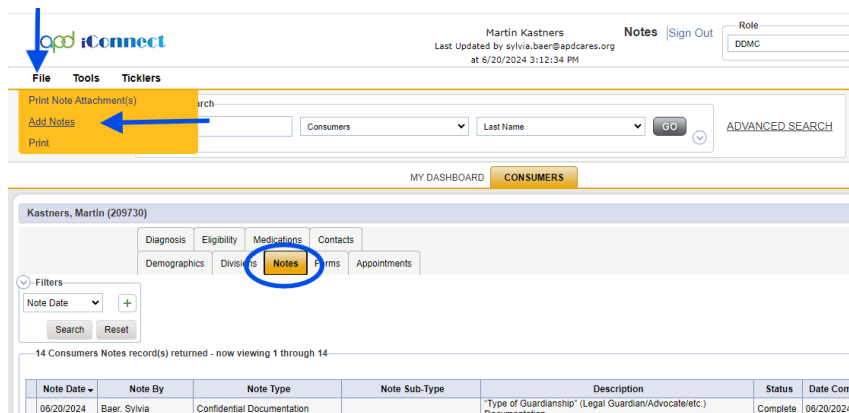
Once the Care Coordinator has completed the PCSP process, the PCSP will be created in a form in iConnect.

### Schedule the Support Plan

#### Role: DDMC

Upon enrolling the client into the DDMC Pilot Program the Care Coordinator will schedule the initial face to face meeting within 5 days of enrollment and begin the support planning process.

1. Contact the individual to schedule the PCSP meeting and to identify PCSP participants. Document each contact in a Note in the client's record.
2. To do so, navigate to the Consumer's record and click on the **Notes** tab > **File > Add Note**:



The screenshot shows the iConnect user interface. At the top, there's a navigation bar with 'File', 'Tools', and 'Ticklers'. Below this, a sidebar contains 'Print Note Attachment(s)', 'Add Note' (highlighted with a blue arrow), and 'Print'. The main area shows a search bar with 'Consumers' selected and a 'GO' button. Below the search bar, there's a 'MY DASHBOARD' section with a 'CONSUMERS' tab. Under this tab, there's a list of tabs: 'Diagnosis', 'Eligibility', 'Medications', 'Contacts', 'Demographics', 'Divisions', 'Notes' (circled in blue), 'Forms', and 'Appointments'. Below the tabs, there's a 'Filters' section with a 'Note Date' dropdown and a '+' button. A 'Search' button and a 'Reset' button are also present. Below the filters, it says '14 Consumers Notes record(s) returned - now viewing 1 through 14'. At the bottom, there's a table with columns: 'Note Date', 'Note By', 'Note Type', 'Note Sub-Type', 'Description', 'Status', and 'Date Completed'. The table contains one row of data.

Note Date	Note By	Note Type	Note Sub-Type	Description	Status	Date Completed
06/20/2024	Baer, Sylvia	Confidential Documentation		"Type of Guardianship" (Legal Guardian/Advocate/etc.) Documentation	Complete	06/20/2024

3. In the new Note record, update the following fields:
  - a. Division = APD
  - b. Note Type = Support Plan
  - c. Note Sub-Type = Pre-Support Planning Activities

d. Status = Complete

4. When finished, click **File > Save and Close Note.**

Notes Details	
Division *	APD ▼
Note By *	Reed, Monica ▼
Note Date *	03/29/2018
Program/Provider	▼
Note Type *	Support Plan ▼
Note Sub-Type	Pre-Support Planning Activities ▼
Description	
Note	3/29/18 - Attempted to contact the Consumer. Left voicemail.
Status *	Complete ▼
Date Completed	03/29/2018

5. Upon identifying Consumer Participants, add them to the client's record. Use ["As Needed: Adding New Contacts into Contacts Tab"](#) for further instructions.

6. Upon identifying the client's PCSP participants, reach out to invite them to participate in the PCSP meeting. Document each participant outreach attempt in a Consumer Note. To do so, navigate to the client's record and click on the **Notes** tab > **File > Add Note.**

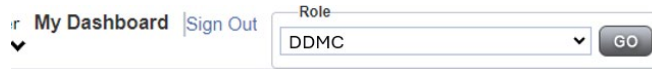
- In the new Note record, update the following fields:
- Division = APD
- Note Type = Support Plan
- Note Sub-Type = Pre-Support Planning Activities
- Status = Complete
- When finished, click **File > Save and Close Note.**

7. Prior to conducting the Initial Support Plan/Support Plan meeting, the Care Coordinator will prepare the documentation. Care Coordinators will take a meeting signature sheet to the Initial Support Plan/Support Plan meeting with the client. A blank PCSP output report is printed. It will be filled out when face to face with the consumer and then keyed into the PCSP form in iConnect.

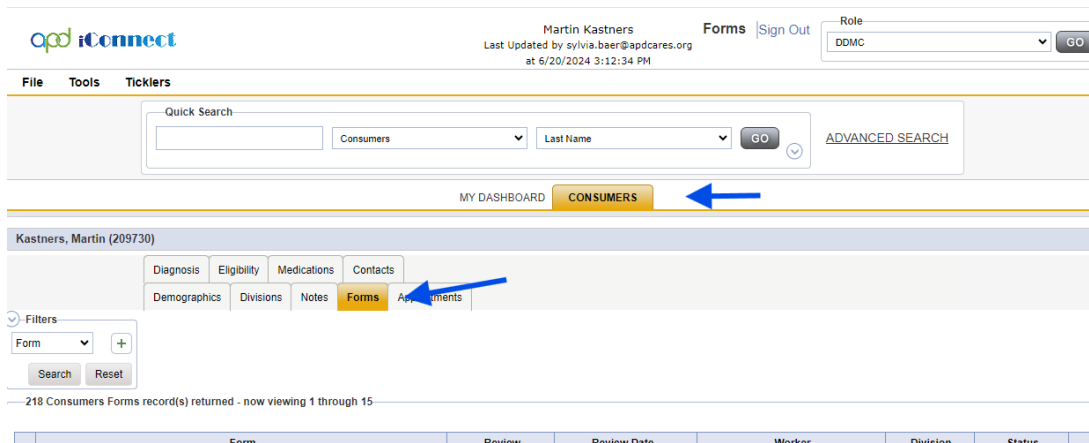
## Create the Support Plan

### Role: DDMC

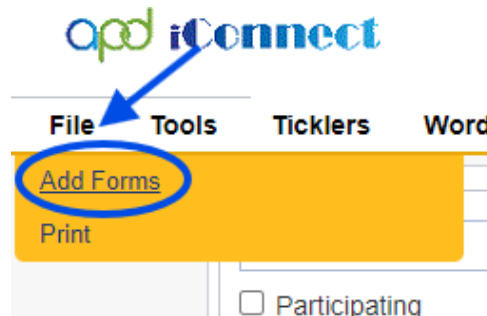
1. To begin, log into iConnect and set Role = **DDMC**. Click **Go**.



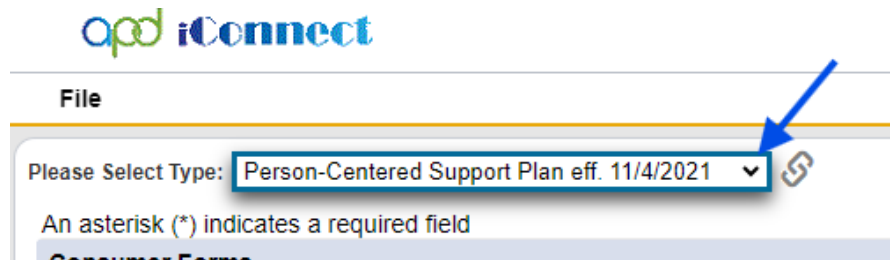
2. Navigate to the client's record and click on the **Forms** tab:



3. To add a new PCSP, use **File** and select **Add Form**.



4. A new Form Details window displays. In the "Please Select Type:" dropdown, choose the Person-Centered Support Plan eff. 11/4/2021



apod iConnect

File

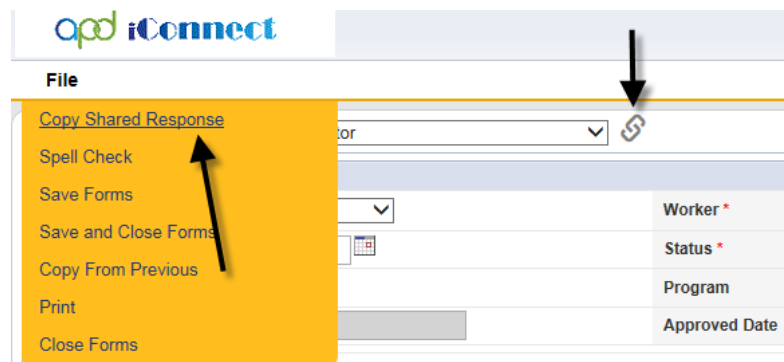
Please Select Type: Person-Centered Support Plan eff. 11/4/2021

An asterisk (\*) indicates a required field

5. Complete the header information. In the header of the form, update the following fields:
  - a. Review = Initial
  - b. Status = Open

**NOTE: There should be only one PCSP for the year. The Care Coordinator will leave the status = Open and make changes to the same form when there is an update vs. creating a new form each time there is an update.**

6. Information from other forms such as the QSI Assessment can be copied over into the PCSP record automatically using the Copy Shared Response functionality in iConnect.
7. The Care Coordinator will select **File > Copy Shared Response** and select the QSI Assessment from the list of available forms.



apod iConnect

File

Copy Shared Response

Spell Check

Save Forms

Save and Close Forms

Copy From Previous

Print

Close Forms

8. A list of Assessments with Shared Responses is displayed. Select the QSI form.

**Assessments with Shared Responses**

**File**

Filters  
Search Reset

5 Assessments with Shared Responses record(s) returned - now viewing 1 through 5

Form Name	Review	Review Date	Rater
EZ iBudget Calculator	Initial	04/17/2018	Buck, Jennifer
Questionnaire Situational Information	Initial	04/17/2018	Buck, Jennifer
Person Centered Support Plan	Initial	04/13/2018	Buck, Jennifer
Person Centered Support Plan	Initial	04/04/2018	Buck, Jennifer
Person Centered Support Plan	Initial	04/04/2018	Buck, Jennifer

<< First < Previous Retrieve 15 Records at a time Next > Last >>

9. Once selected, the system will pull the information from the QSI to fill in the scores of the QSI section on the PCSP form.

10. Please note that the PCSP in iConnect should be filled out in the same way as the hard copy PCSP. For questions related to what type of information should be included in the various sections of the PCSP, please refer to the Person-Centered Support Plan Training modules found on the [APDcares.org website](http://APDcares.org).

11. Update all remaining fields.

**Person Centered Support Plan**

**Consumer Forms**

Review \* Initial  
Review Date \* 07/05/2018  
Division \* APD  
Approved By  
Note

Worker \* Buck, Jennifer  
Status \* Open  
Provider/Program  
Approved Date

**PERSON CENTERED SUPPORT PLAN**

Support Plan Effective Date \* 05/01/2018

**My Waiver Support Coordinator**

WSC Name \* Buck, Jennifer  
WSC Agency Name:  
WSC Phone Number:  
WSC Email:

**My Family, Friends, and Support System**

Add New Relation Edit Relation Search Existing Relations Clear

Name

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

## Add Medication

The Care Coordinator can add a medication in the Medication tab of the client record or add a medication from the PCSP form, which will go to the Medication tab of the client record.

### Add a new Medication from a Form

1. To add a new medication from within the PCSP, the Care Coordinator will either add a new PCSP or open the existing PCSP.

2. Medications are captured in the Medications tab of iConnect and can be added to the PCSP without the Care Coordinator re-typing the information.
3. Care Coordinators can also add new medications from the PCSP form and the medication will be added to the PCSP and the Medications tab of iConnect.
4. To add an existing medication from the Medication tab to the PCSP, select **Search** and a list of medications from the Medications tab of the client's record will be displayed. Select the check box for each medication that needs to be added to the PCSP. Click ADD to insert the medication into the PCSP.

Medication (Refill#)	Medication	Dose/Route	Dose Units	Frequency	Route	Prescribed By	Order Date	DX Date	Status	Instructions	Reason for Medication	When Discontinued	Med Order	Packaging	Type of Medication	Paraphrase	Other Medication	Side Effects/Adverse Reactions
1	Aspirin	81 mg	mg	Once daily	Oral	Dr. Smith	05/20/2024	05/20/2024	Active	Aspirin	For heart health	None	Aspirin	Tablets	Aspirin	Aspirin	Aspirin	None

5. To add a new medication from the PCSP that will be added to the PCSP form and to the Medication tab, use the Medication Control on the PCSP form.
6. In the My Health section of the PCSP form, select **Add New Medication**.

**My Health**

Important Information About My Health

Hospitalizations in the past year?

My Medication Information (current as of date of support plan meeting)

**Medications**

0 record(s) returned

7. The Medication search window opens. Begin typing the name of the medication. Matching values are displayed. Select the medication and complete the remaining fields. If the medication does not auto populate in search, type in "Other" in the Medication search. Select "Other" and then a new text box will display "Other Medication." Type in the name of the Medication in the text box.

**Add New Medication**

Medication

Order Date (start date)

D/C Date (end date)

Status

Dose

Dose Units

Frequency

Route

Where Obtained

Mail Order

Packaging

Type of Assistance

Medication Assistance

Prescribed By

Instructions per Label

Reason for Medication

Side Effects/Problems Experienced

8. Once complete, select **Save and Close**. The page will refresh with the medication information section completed.
9. **Save and Close the PCSP form.**

## Add Medication to the Medication Tab

1. Navigate to the **Medication** tab on the client's record.
2. Go to **File > Add Medication**.

The screenshot shows the iConnect web application interface. At the top, there's a header with the user's name 'Martin Kastners', their role 'DDMC', and a 'Sign Out' button. Below the header, there's a navigation bar with 'File' and 'Ticklers' tabs. The 'File' tab is active, and the 'Add Medication' option is highlighted in orange. A blue arrow points to this option. Below the navigation bar, there's a search bar with a 'GO' button and a dropdown menu for 'Consumers'. The main content area shows the 'Medications' tab selected for the client 'Kastners, Martin (209730)'. There are filters for 'NDC Code' and a 'Search' button. A message at the bottom indicates '16 Consumers Medications record(s) returned - now viewing 1 through 15'.

3. Complete the Medication details page.

The screenshot shows the 'File' tab in the iConnect application, displaying the 'Add Medication' form. The form is titled 'File' and includes a note: 'An asterisk (\*) indicates a required field'. The form fields are as follows:

- Medication \* (text input)
- NDC Code (text input)
- Dose \* (text input)
- Dose Units \* (dropdown menu)
- Strength \* (text input)
- Frequency \* (dropdown menu)
- Route \* (dropdown menu)
- Prescribed By \* (text input)
- Order Date (start date) \* (date picker, showing 04/08/2024)
- D/C Date (end date) (date picker, showing MM/DD/YYYY)
- Status \* (dropdown menu)
- PRN? (checkbox)
- Instructions per Label (text input)
- Reason for Medication (text input)
- Side Effects/Problems Experienced (text input)
- Where Obtained (dropdown menu)
- Mail Order (checkbox)
- Packaging (dropdown menu)
- Type of Assistance \* (dropdown menu)
- Medication Assistance \* (dropdown menu)
- Send To Emar (text input)
- Dispense Time 1 (dropdown menu)
- Dispense Time 2 (dropdown menu)
- Dispense Time 3 (dropdown menu)
- Dispense Time 4 (dropdown menu)
- Dispense Time 5 (dropdown menu)

4. If the medication does not auto populate in search, type in "Other" in the Medication search. Select "Other" and then a new text box will display "Other Medication." Type in the name of the Medication in the text box.

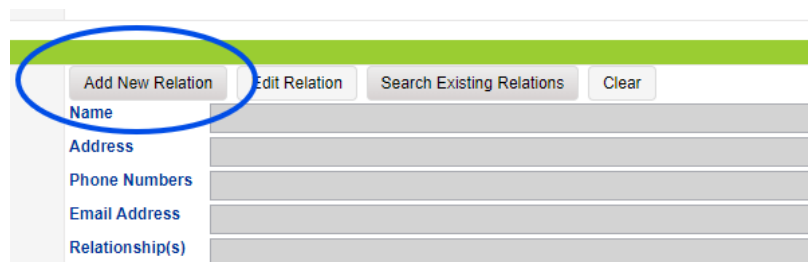
- When complete, select **File > Save and Close Medication**. Repeat this process for each Medication.

## Add Contacts

Similar to adding the Medication, a Contact can be added into the Contacts tab or in the PCSP. When adding a Contact into the PCSP, that Contact will also be added to the Contacts tab.

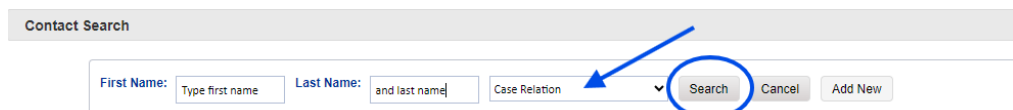
### Add a new Contact from a Form

- In the PCSP, there are buttons that say Add New Relation and Search Existing Relations. To add a new relation, select the **Add New Relation** button.



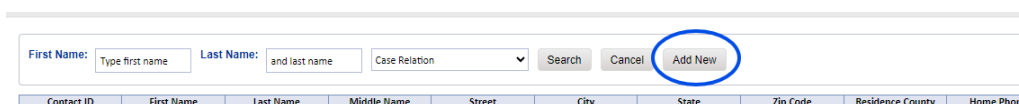
The screenshot shows a form with a green header bar. Below the header, there are four buttons: 'Add New Relation', 'Edit Relation', 'Search Existing Relations', and 'Clear'. The 'Add New Relation' button is circled in blue. Below the buttons, there are several text input fields labeled 'Name', 'Address', 'Phone Numbers', 'Email Address', and 'Relationship(s)'.

- Enter the Name of the new contact in the text box as instructed. Change the Family Relation to Case Relation. **Every Relation in iConnect is a Case Relation**. Press **Search**.



The screenshot shows the 'Contact Search' form. It has two text input fields for 'First Name' and 'Last Name'. Below these fields is a dropdown menu labeled 'Case Relation'. To the right of the dropdown menu is a 'Search' button, which is circled in blue. There are also 'Cancel' and 'Add New' buttons to the right of the 'Search' button.

- After the Search, a list view grid will appear. If there are no contacts with that name, select the **Add New** button.



The screenshot shows the 'Contact Search' form after a search. The 'Add New' button is circled in blue. Below the form, there is a table with columns: Contact ID, First Name, Last Name, Middle Name, Street, City, State, Zip Code, Residence County, and Home Phone.

- Fill out the New Relation as indicated. Choose the primary relationship from the drop-down menu titled "Relationship." Once completed, press **Save and Close**.

## Search an Existing Contact from a Form

1. To add an existing contact to a form, select the **Search Existing Relations** button.

2. Click the proper contact to add them to the form.

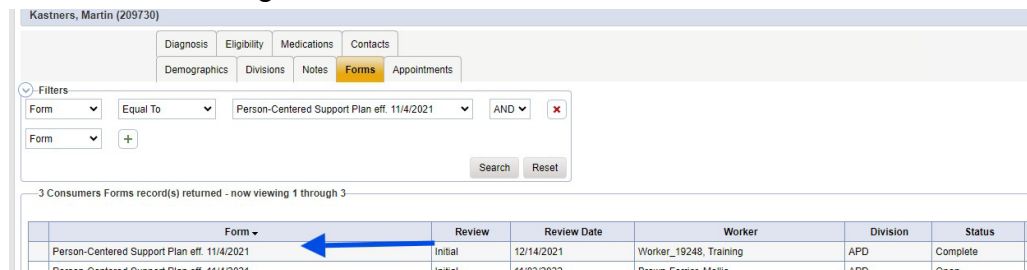
Relation Search				
RecID	Name	Relationship	Phone	Date Of Birth
72029	Bailey Hatguy	Parent		

3. The form will update with their information.

## Complete the Support Plan Process

There will be a second meeting with the client. The completed PCSP report output is printed from iConnect. The PCSP is signed by the client and added as an attachment to Notes in iConnect.

To print the PCSP, navigate to the **Forms** tab. Open the PCSP form from the list view grid.



Kastners, Martin (209730)

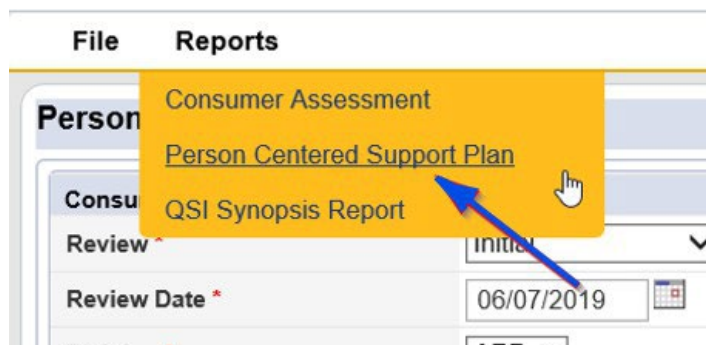
Diagnosis Eligibility Medications Contacts  
Demographics Divisions Notes **Forms** Appointments

Filters  
Form Equal To Person-Centered Support Plan eff. 11/4/2021 AND  
Form +  
Search Reset

3 Consumers Forms record(s) returned - now viewing 1 through 3

Form	Review	Review Date	Worker	Division	Status
Person-Centered Support Plan eff. 11/4/2021	Initial	12/14/2021	Worker_19248, Training	APD	Complete
Person-Centered Support Plan eff. 11/4/2021	Initial	11/03/2022	Brown-Farrier, Mollie	APD	Open

1. From within the PCSP form, select **Reports > Person Centered Support Plan**.



File Reports

Person

Consumer Assessment  
Person Centered Support Plan  
QSI Synopsis Report

Review \* Initial

Review Date \* 06/07/2019

2. This will launch a new window. The Care Coordinator can either save directly to Note or save as pdf to their computer. Either option will give the Care Coordinator a printable pdf version of the PCSP to be used when gathering client/legal representative signatures.

HTML Export Save to Note

1 of 2 Find | Next

apd  
agency for persons with disabilities  
State of Florida

**Person-Centered Support Plan**

Plan Effective Date: 02/11/2019  
Support Plan Update: 04/01/2019

**About Me**

Last Name: Sheppard First Name: John Nickname: Date of Birth: 01/01/1988  
Medicaid ID: 12314588 iConnect ID: 10106 Legal Status:  
Living Setting: Hospital - Psychiatric Spoken Language: English Alternate Communication: Braille

**Where I Live**

Street Address: 12 Sippary Road City: MIAMI State: FL Zip: 33101  
Email Address: info@wellsky.com Cell/Home Phone: (205)854-9875 Work Phone: (559)874-4894 Region: SOUTHERN  
Deliver my mail to: 12 Sippary Road City: MIAMI State: FL Zip: 33101  
Best way to contact me: Work Phone/Permission to leave a voicemail message

**My Legal Representative(s)**

#1  
Last Name: Admission First Name: Central Guardian/Legal Representative Type: Legal Representative  
Relationship: Caregiver Other:  
Address: 1234 Esplanade Way, Suite 100 City: TALLAHASSEE State: FL Zip: 32399  
Day Phone: Night Phone: Cell Phone:  
Email Address:

3. If the Save to Note option is chosen, a Note window will launch with the pdf output listed as an attachment. Type in any additional information and click the **Append Text to Note** button. The signed signature page of the PCSP will need to be attached. Skip to step 5.

**Notes Details**

Division: APD  
Note By: [User]  
Note Date: 06/07/2019  
Program/Provider: WSC Agency1 Details  
Note Type: Support Plan  
Note Sub-Type: Signatures  
Description: Person Centered Support Plan

**Note**

New Text  
Printable output to share with consumer / legal representative and to obtain signatures.

Append Text to Note

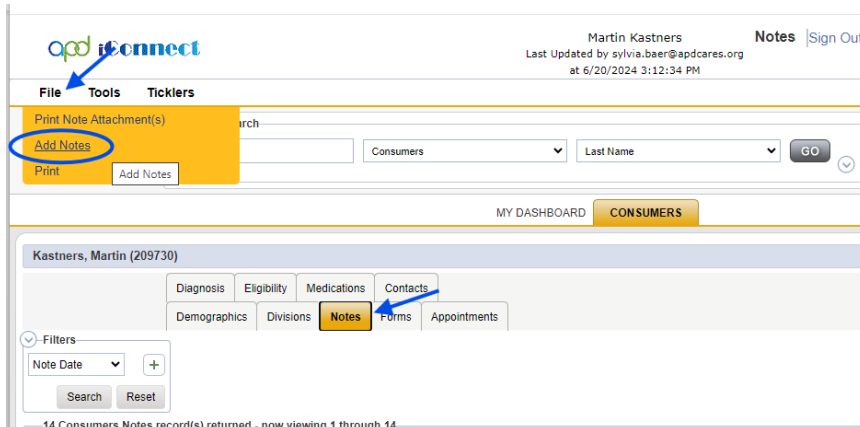
Status: Pending

**Attachments**

Add Attachment

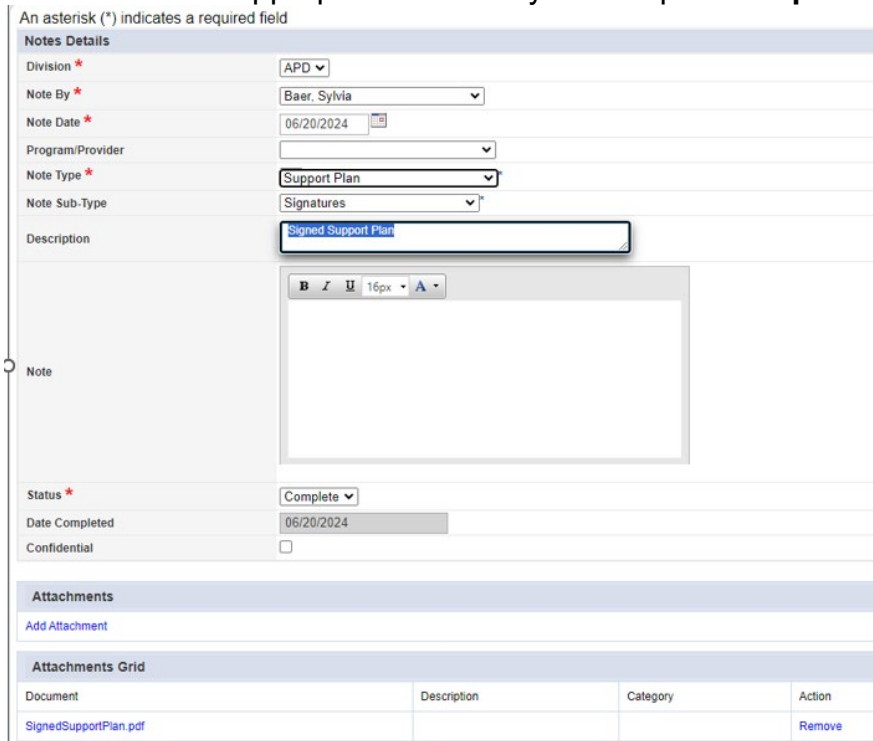
Document	Description
tp_custom_PersonCenteredSupportPlanReport.pdf	

4. Attach a copy of the signed PCSP to a Note in iConnect. On the client's record, click on **Notes > File > Add Note**:



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

- a. Note Type = Support Plan
- b. Note Sub-Type = Signatures
- c. Status = Complete
- d. Attach the signed Person-Centered Output Report to the Note record by clicking **Add Attachment > Browse >** select the appropriate file from your computer > **Upload**



An asterisk (\*) indicates a required field

**Notes Details**

Division \* APD

Note By \* Baer, Sylvia

Note Date \* 06/20/2024

Program/Provider

Note Type \* Support Plan

Note Sub-Type Signatures

Description Signed Support Plan

**Note**

Status \* Complete

Date Completed 06/20/2024

Confidential ☐

**Attachments**

Add Attachment

**Attachments Grid**

Document	Description	Category	Action
SignedSupportPlan.pdf			Remove

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

## Support Plan Update

1. Throughout the PCSP year, the Care Coordinator may need to update the existing PCSP based on changes in the client's needs or desires. The existing PCSP form will be amended/updated. A new PCSP form will not be created.
2. The Care Coordinator will locate the PCSP form from the Consumer's record > **Forms** tab and select the form to edit.
3. The form must be in Draft, Pending or Open status to be editable. Forms in the Complete status are read only and cannot be edited. Forms in the Draft status are perceived to not be done and should only be used when in the drafting stages.
4. Update the fields as needed. Click **File > Save and Close Forms**.
5. Every time a form is saved, a snapshot of the form is saved in the History Records. Select **File > History** to review previous versions of the PCSP

The screenshot shows the DDMC iConnect web application interface. At the top, the 'apd iConnect' logo is on the left, and user information 'Alice Sheppard, Last Updated by jrbuck at 7/5/2018 2:39:41 PM' is on the right. Below the header, there are tabs for 'File' and 'Reports'. The 'File' menu is open, showing options: 'Copy Shared Response', 'History' (highlighted with a black arrow), 'Duplicate Assessment', 'Spell Check', 'Save Forms', 'Save and Close Forms', 'Print', and 'Close Forms'. The main content area displays a form for a 'PERSON CENTERED SUPPORT PLAN'. Fields include 'Worker' (Buck, Jennifer), 'Status' (Draft), 'Provider/Program', and 'Approved Date'. At the bottom, there are 'Open' and 'Complete' buttons.

6. If more than one history record exists, click the Next or Last buttons at the bottom of the page to view each entry.

**File**

**History Viewer**

This record was updated by j buck at 7/5/2018 2:39:41 PM

**Person Centered Support Plan**

**Consumer Forms**

Review *	Initial	Worker *	Buck, Jennifer
Review Date *	07/05/2018	Status *	Draft
Division *	APD	Provider/Program	
Approved By		Approved Date	
Note			

**PERSON CENTERED SUPPORT PLAN**

Support Plan Effective Date\* 05/01/2018

**My Waiver Support Coordinator**

WSC Name\* Buck, Jennifer

WSC Agency Name:

WSC Phone Number:

WSC Email:

<< First < Previous Record 1 of 3 Next > Last >>

## Annual Support Plan Review

1. The PCSP expires after a year. The Care Coordinator usually begins the process 90 days in advance.
2. Navigate to the client's record and click on the **Forms** tab. Click the **PCSP** form with Status = Open.

Kastners, Martin (209730)

Diagnosis Eligibility Medications Contacts **Forms** Appointments

Demographics Divisions Notes

Filters

Form Equal To Person-Centered Support Plan eff. 11/4/2021 AND

Status Equal To Open AND

Form +

Search Reset

1 Consumers Forms record(s) returned - now viewing 1 through 1

Form	Review	Review Date	Worker	Division	Status
Person-Centered Support Plan eff. 11/4/2021	Initial	05/02/2024	Buffington, Christine	APD	Open

First Previous Records per page 15 Next Last

0.8.1.4

3. Care Coordinators should never utilize the same PCSP form year to year. However, some information may not change. While goals, needs, and other important factors must be reviewed and updated each year, Care Coordinators may use the **Duplicate Assessment** feature to copy information such as the social history. However, the Care Coordinator must update all sections of the PCSP with new information and change the effective date of the plan.

4. Click **File > Duplicate Assessment**. A notification window displays. Click OK. The new PCSP form that is a copy of the existing PCSP form will be displayed.

The screenshot shows the DDMC iConnect web application. On the left, a yellow sidebar contains the 'File' menu, with 'Duplicate Assessment' highlighted and an arrow pointing to it. The main content area displays a 'PERSON CENTERED SUPPORT PLAN' form. The form header includes fields for 'Initial' (set to 'Initial'), 'Worker' (set to 'Buck, Jennifer'), 'Status' (set to 'Draft'), 'Provider/Program', and 'Approved Date'. Below the header, the 'Support Plan Effective Date' is set to '05/01/2018'. The 'My Waiver Support Coordinator' section shows 'WSC Name' as 'Buck, Jennifer'. The top right corner of the interface shows the user 'Alice Sheppard' and the last update information.

- a. In the Form header, change the Review Type = Annual
  - b. Update the PCSP effective date.
  - c. Make updates to goals, needs, and other important factors.
  - d. When finished, update Status = Open
  - e. Click **File > Save and Close Forms**
5. The Forms list view grid displays. Select the existing (previous year's) PCSP form.
    - a. In the header, update the Status = Complete.
    - b. Click **File > Save and Close Forms**

## Chapter 5 | Level of Care

### Introduction

Level of Care (LOC) assessments are completed by the Care Coordinator, to assist in determining if an individual meets eligibility requirements and to what level of service is required to accommodate the client's needs. The Care Coordinator will utilize the HCBS Waiver Eligibility Worksheet to document the LOC determinations. The initial HCBS Waiver Eligibility Worksheet will be done by APD staff and thereafter the annual HCBS Waiver Eligibility Worksheet will be done by the Care Coordinator due in 365 days.

### Complete Waiver Eligibility Worksheet

1. To begin, the Case Coordinator will log into iConnect and set Role = **DDMC**. Click **Go**.
2. The client's initial HCBS Waiver Eligibility Worksheet will be available by navigating to the client's record and clicking on the **Forms** tab.

File Tools Ticklers

Quick Search:  Consumers  Last Name  GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS

Kastners, Martin (209730)

Diagnosis Eligibility Medications Contacts  
Demographics Divisions Notes **Forms** Appointments

Filters: Form  Equal To  HCBS Waiver Eligibility Worksheet AND

Form  + Search Reset

3 Consumers Forms record(s) returned - now viewing 1 through 3

Form	Review	Review Date	Worker	Division	Status
HCBS Waiver Eligibility Worksheet	Initial	05/02/2024	Buffington, Christine	APD	Complete

3. To add a new form, annually, click **Forms > File > Add Form** and in the "Please Select Type" field select the **HCBS Waiver Eligibility Worksheet**

apd iConnect

File

Please Select Type:

An asterisk (\*) indicates a required field.

Consumer Form **HCBS Waiver Eligibility Worksheet**

Review \*

Review Date \* 06/20/2024

Division \* APD

Approved By  Lookup Clear

4. In the new HCBS Waiver Eligibility Worksheet, complete all relevant fields
5. Update the fields in the header:
  - a. Review = Annual
  - b. Division = APD
  - c. Status = Complete
6. When finished, click **File > Save Forms**

**Consumer Forms**

Review *	Initial	Worker *	Baer, Sylvia
Review Date *	06/21/2024	Status *	Complete
Division *	APD	Provider/Program	
Approved By	Baer, Sylvia	Approved Date	06/21/2024

**HCBS WAIVER ELIGIBILITY WORKSHEET**

Client First Name:	Bowler
Client Last Name:	Hatguy
*Social Security Number:	111-11-1111
Region:	
Support Plan Effective Date:	MM/DD/YYYY

7. To print the form, navigate to the **Word Merge** menu and select **HCBS Waiver Eligibility Work Sheet**.


**Word Merge**

HCBS Waiver Eligibility Work Sheet

**HCBS WAIVER ELIGIBILITY WORKSHEET**

Client First Name:	Bowler
--------------------	--------

8. The Word Merge will be displayed. Download and print the Word Merge to obtain the necessary signatures.


Bowler: Hatguy  
6/21/2024 3:34 PM

---

File

**Generate Merge Document**  
Click the "Open Document" button to open the Merge Document for editing.  
[Open Document](#)


**Save to Note**  
If no changes have been made to the Merge Document, click "Save to Note". This current word merge template will be uploaded to a note record with the merge fields populated.  
[Save to Note](#)

**Upload and Save to Note**  
If changes were made to the Merge Document, click "Upload and Save to Note" to select the saved file and upload that document to a note record. Don't forget to delete the saved document after you have attached it to the note record.  
[Upload and Save to Note](#)

**Preview (read-only)**  
This is a preview of your merge document and is not editable.

WordMergePDFPreview.aspx

1 / 1 100% + -



**iBudget Florida HCBS Waiver Eligibility Work Sheet**

Name: Bowler Hatguy	SSN: 111-11-1111
Region: CENTRAL	Support Plan Effective Date: 07/01/2024

**I. Level of Care Eligibility:**  
The individual is an APD client with a Developmental Disability who meets one of the following criteria and is eligible to receive services provided in an ICF/DD. Check the criteria that are met.

Option A. ☐ The individual's primary disability is Intellectual Disability with an intelligence quotient (IQ) of 59 or less.

Option B. ☐ The individual's primary disability is Intellectual Disability with an intelligence quotient (IQ) of 60 to 69 inclusive and the individual has at least one of the following handicapping conditions OR the individual's primary disability is Intellectual Disability with an intelligence quotient (IQ) of 60 to 69 inclusive and the individual has severe functional limitations in at least three of the major life activities. Please check all handicapping conditions and major life activities that apply.

9. After obtaining the necessary signatures, attach the signed HCBS Waiver Eligibility Worksheet to the consumer's record. To do so, navigate to the consumer's record and click on **Notes > File > Add Note**:

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

- Division = APD
- Note Type = APD Waiver Eligibility Verification
- Note Sub-Type = LOC Met/Medicaid Eligible
- Status = Complete
- Attachments = Signed HCBS Eligibility Work Sheet

11. From the **File** menu > select **Save and Close Notes**.

Notes Details

Division *	APD ▼
Note By *	Baer, Sylvia ▼
Note Date *	06/21/2024
Program/Provider	▼
Note Type *	APD Waiver Eligibility Verification ▼
Note Sub-Type	LOC Met/ Medicaid Eligible ▼
Description	
Note	<div style="border: 1px solid gray; padding: 5px;"> <p><b>B</b> <i>I</i> <u>U</u> 16px <b>A</b> ▼</p> <div style="height: 100px;"></div> </div>
Status *	Complete ▼
Date Completed	06/21/2024
Confidential	<input type="checkbox"/>

Attachments

[Add Attachment](#)

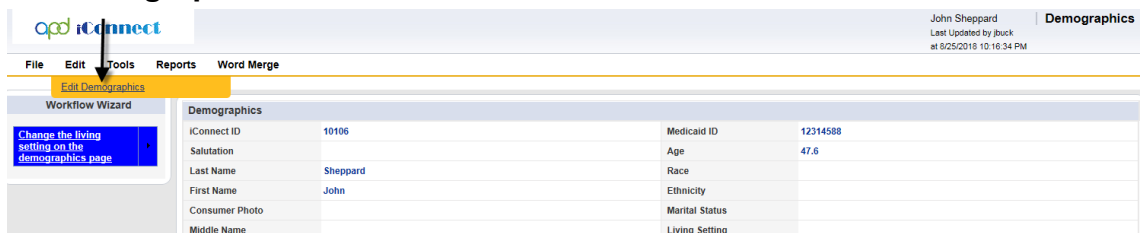
Document	Description	Category
HCBS signed		

May 2025

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## Chapter 6 | Other Non-Waiver Eligible Settings – Admission

1. The Care Coordinator or Pre-Enrollment Worker will document the client's admission to a jail, nursing home, rehab center, hospital. To begin, log into iConnect and set **Role = DDMC** or Region Pre-Enrollment Workstream Worker. Click **Go**.
2. Navigate to the client's record and click on the Notes tab. Click **File > Add Note**.
3. In the new Note record, update the following fields:
  - a. Division = APD
  - b. Note Type = Facility Placement
  - c. Note Sub-Type = Consumer Admitted
  - d. Status = Alert
  - e. Enter details about the facility placement
  - f. Then click **File > Save and Close Notes**
4. Saving a Note with Note Type = Facility Placement and Sub Type = Consumer Admitted, triggers a Workflow Wizard with two ticklers for the secondary worker on the Division record:
  - a. Change the living setting on the demographics page (due immediately)
  - b. Verify Consumer to Remain on DD Managed Care Pilot (due in 60 days and visible via My Dashboard)
5. Click the Change the living setting on the demographics page tickler to open the demographics list view page.
6. From the **Edit** menu in the top toolbar > select **Edit Demographics**.



Demographics	
iConnect ID	10106
Salutation	
Last Name	Sheppard
First Name	John
Consumer Photo	
Middle Name	
Medicaid ID	12314588
Age	47.6
Race	
Ethnicity	
Marital Status	
Living Setting	

7. Update the following fields:
  - a. Living Setting = select applicable value

8. When complete, click **File > Save and Close Demographics**.
9. Navigate to the client's record to verify that the client is Medicaid eligible, and all other criteria have been met to enroll in the iBudget waiver.
10. If the consumer will not remain in Pre-Enrollment or the DD Managed Care Pilot, the Care Coordinator will contact the Pre-Enrollment Worker (secondary worker).
11. If the client will remain in Pre-Enrollment or DD Managed Care Pilot, send a note to the Pre-Enrollment or Waiver Workstream Worker (Secondary Worker).
12. Navigate to the client's record and click **Notes > File > Add Note**.
13. In the new Note record, update the following fields:
  - a. Division = APD
  - b. Note Type = Facility Placement
  - c. Description = Remains on Pre-Enrollment or DD Managed Care Pilot
  - d. Note = enter details
  - e. Note Status = Complete
  - f. Note Recipient = search for and select the Pre-Enrollment or DDMC Care Coordinator.
14. When finished, click **File > Save and Close Notes**

## Chapter 7 | Safety Plan

### Introduction

In some cases, clients exhibit behavior that indicates the need for a monitored plan of care. These behaviors include but are not limited to a documented history of engaging in sexual aggression, sexual battery or otherwise engaged in nonconsensual sexual behavior with another individual, with or without police involvement. A plan is needed to address their unique needs and create a safe environment for everyone and facilitate successful community living. In these instances, a Safety Plan developed by the Care Coordinator with consultation from the authorized behavior analysis (BA) provider or Area Behavior Analyst (ABA), when needed. These plans are integrated into the PCSP and implemented where the client resides. The following Chapter outlines how the Safety Plan should be documented within iConnect.

1. To begin, the Care Coordinator will log into iConnect and set Role = **DDMC**. Click **Go**.
2. Navigate to the client's record and click on the **Forms** tab. Click the current Person-Centered Support Plan to edit.

Kastners, Martin (209730)

Diagnosis Eligibility Medications Contacts  
Demographics Divisions Notes **Forms** Appointments

Filters  
Form Equal To Person-Centered Support Plan eff. 11/4/2021 AND  
Status Equal To Open AND  
Form +

Search Reset

1 Consumers Forms record(s) returned - now viewing 1 through 1

Form	Review Date	Worker	Division	Status	
Person-Centered Support Plan eff. 11/4/2021	Initial	05/02/2024	Buffington, Christine	APD	Open

First Previous Records per page: 15 Next Last

9.8.1.4

3. Navigate to the Personal Rights: (not related to guardianship) section of the PCSP.

**Personal Rights: (not related to guardianship)**

Is there a right I would like to learn more about?

My WSC provided information about abuse, neglect, and exploitation to me this year, and I know about the reporting process and requirements.

Do I have restrictions on my rights?

Safety Plan required and included (if applicable choose Yes or No).

**My Health**

4. Safety Plan required and included (if applicable choose Yes or No)  
= select "Yes"

Personal Rights: (not related to guardianship)	
Is there a right I would like to learn more about?	<input type="button" value="v"/>
My WSC provided information about abuse, neglect, and exploitation to me this year, and I know about the reporting process and requirements.	<input type="button" value="v"/>
Do I have restrictions on my rights?	<input type="button" value="v"/>
Safety Plan required and included (if applicable choose Yes or No).	<input checked="" type="button" value="v"/>
<b>My Health</b>	
	Yes
	No

5. A new section of the PCSP will be displayed with information to be filled out regarding the Safety Plan.

Safety Plan	
Summary of Historical Events: : List by date, any behaviors or charges that are safety concerns for the person or the community. What concerns do you have or do you think the community might have about your behavior in the past?	<input type="text"/>
<b>Special Considerations:</b>	
a) If there is a court order, indicate what it requires:	<input type="text"/>
b) If there is a Probation Officer, identify who, their location, contact numbers and any other court requirements:	<input type="text"/>
c) If required, identify where the person must register locally as a "sex offender":	<input type="text"/>
<b>General Precautions and Preventative Measures</b>	
a) Identify any triggers, high-risk situations, environmental and personal stressors that might lead to re-offending:	<input type="text"/>
b) What predatory "grooming" behaviors are known:	<input type="text"/>

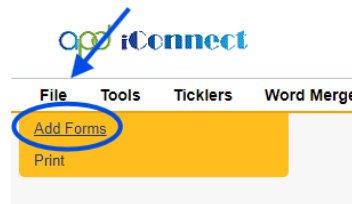
6. Fill out the necessary fields and once completed go to **File > Save and Close Forms**

## Chapter 8 | Diagnosis – Mental Health and Medical Form

### Introduction

In some cases, clients may have additional diagnoses. These are different than the original diagnosis that allowed the client to become eligible for DD Managed Care Pilot Program or the iBudget Waiver. To document the additional diagnosis, follow the steps outlined in this chapter.

1. To begin, the Care Coordinator will log into iConnect and set Role = **DDMC**. Click **Go**.
2. Navigate to the client's record and click on the **Forms** tab. Go to **File** and select **Add Forms**.



3. In the "Please Select Type:" dropdown menu, select Diagnoses – Mental Health and Medical

 A screenshot of the 'File' form in iConnect. The 'Please Select Type:' dropdown menu is open, showing a list of options: 'Diagnoses - Mental Health and Medical' (highlighted), 'Consumer Form', 'HCBS Waiver Eligibility Worksheet', and 'Person-Centered Support Plan eff. 11/4/2021'. Below the dropdown, there are fields for 'Review \*', 'Review Date \*' (set to 06/20/2024), 'Division \*' (set to APD), and 'Approved By' with a 'Lookup' button.

4. Fill out the form header:
  - a. Review = as applicable
  - b. Status = Open
5. Fill out the form. Use the ellipses to search for the diagnoses.

 A screenshot of the 'Mental Health Diagnoses' form. It has a blue header bar with the title. Below, there are two rows: 'Mental Health Diagnosis 1' and 'Mental Health Diagnosis 2'. Each row has a text input field and a button with three dots (ellipsis) to the right. The ellipsis button for 'Mental Health Diagnosis 1' is circled in blue.

- Utilize the search fields to locate the proper diagnosis.

- Once done, navigate to **File > Save and Close Form**.
- The form can be edited in Open Status. To make updates to the form, navigate to the client's record and click **Forms**. The list view grid will display. Utilize the filters to locate the form. Press the green plus sign to add filters.

- In the drop-down menu, choose the appropriate form.

- Press **Search**

11. The form will be displayed in the list view grid. Select the form to open.

Filters

Form

Equal To

Diagnoses - Mental Health and Medical

AND

×

Form

+

Search

Reset

1 Consumers Forms record(s) returned - now viewing 1 through 1

Form	Review	Review Date	
Diagnoses - Mental Health and Medical	Initial	06/12/2024	B:

First

Previous

Records per page 15

Next

Last

## Chapter 9 | Notes in iConnect

### Introduction

Notes is a feature in iConnect that allows the user to upload attachments that are relevant to the client's record such as a court order documentation of a legal representative. The following instructions will go over how to create a Note and how to mark a Note as Read if one is on the My Dashboard.

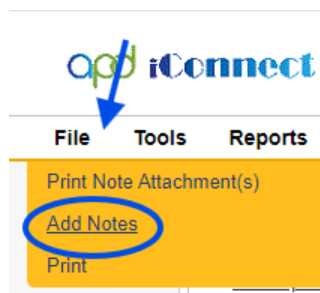
### Creating a New Note

1. Once logged into iConnect, the Care Coordinator will navigate to the client's record and select the **Notes** tab.

The screenshot shows the iConnect interface for a client record. At the top, there are tabs for 'File', 'Tools', and 'Ticklers'. Below these is a 'Quick Search' bar with a text input, a dropdown menu set to 'Consumers', a 'Last Name' dropdown, and a 'GO' button. To the right of the search bar is an 'ADVANCED SEARCH' link. Below the search bar is a 'MY DASHBOARD' section with a 'CONSUMERS' button, which is highlighted with a blue arrow. Below this is a client record for 'Kastners, Martin (209730)'. There are several tabs for this record: 'Diagnosis', 'Eligibility', 'Medications', 'Contacts', 'Demographics', 'Divisions', 'Notes', 'Appointments', and 'Services'. The 'Notes' tab is highlighted with a blue arrow. To the left of the tabs is a 'Filters' section with a 'Note Date' dropdown and a '+' button. Below the filters are 'Search' and 'Reset' buttons. At the bottom, a message states '14 Consumers Notes record(s) returned - now viewing 1 through 14'. Below this is a table of notes.

Note Date	Note By	Note Type	Note Sub-Type	Description	Status	ID
06/20/2024	Baer, Sylvia	Confidential Documentation		"Type of Guardianship" (Legal Guardian/Advocate/etc.) Documentation	Complete	06
05/22/2024	Baer, Sylvia	Facility Placement			Complete	05

2. The list view grid of all Notes created in the client's record will display. To create a new Note, go to **File > Add Notes**.



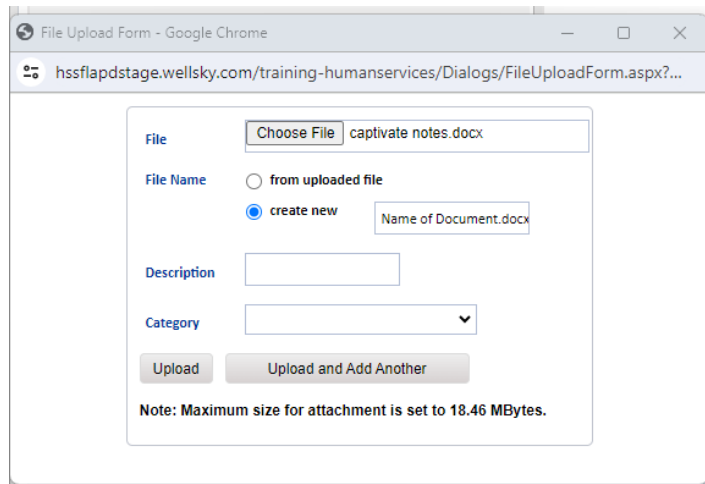
3. Fill out the Note fields as follows:
  - a. Division = APD
  - b. Note By = defaults to worker's name
  - c. Note Date = defaults to today's date
  - d. Note Type = choose the appropriate Note Type
  - e. Note Sub-Type = choose the appropriate Note Sub-Type if needed.
  - f. Description = as needed
  - g. Note = as needed

- h. Status = as needed (Do not leave a Note in Draft unless the Note is still being worked on. Notes should be in Complete Status if done or Pending Status if a response is needed or additional information needs to be added. Only use Alert Notes for Facility Placement as indicated in the workflow.)
- i. Add Attachment = Add any attachments as needed. Each Note can hold up to 10 attachments. If additional attachments are needed additional Notes can be created. The maximum size of the attachment is 18.46 Mbytes.
  - i. To add an attachment, click the Add Attachment hyperlink.

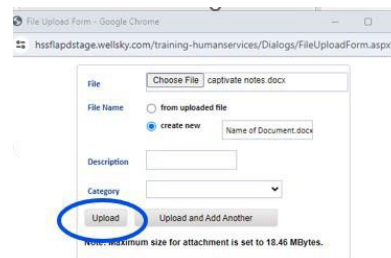
- ii. Click Choose File to locate the document to attach to the Note. **Files cannot contain special characters.**

- iii. Select the file and click Open

- iv. To create a new name for the file, select the radio button "create new." Type in the new name along with the extension. (i.e. .pdf, .doc, .docx, etc.)



- v. A Description can be added if needed.
- vi. Click Upload if that is the only file or select Upload and Add Another to add additional attachments.



- vii. The attachment will be displayed in the Attachments Grid.

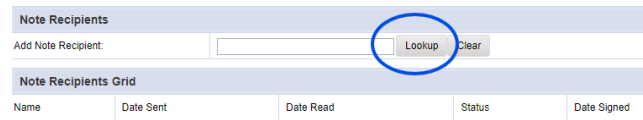
Attachments			
<a href="#">Add Attachment</a>			
Attachments Grid			
Document	Description	Category	Action
<a href="#">Name of Document.docx</a>			<a href="#">Remove</a>

- viii. Add additional attachments as needed up to 10.
- ix. To Remove an attachment, click the Remove hyperlink.

Attachments Grid			
Document	Description	Category	Action
<a href="#">Name of Document.docx</a>			<a href="#">Remove</a>

- j. Adding a Note Recipient to a Note will allow the Note to land on their My Dashboard. This is how to notify an individual in iConnect of information or actions needed. Note Recipients are only individuals in iConnect. To add a Note Recipient, follow the instructions below:

i. Click the Lookup button



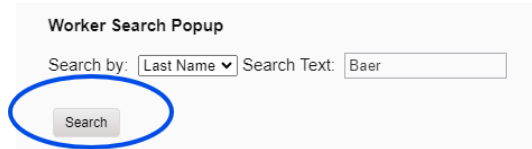
Note Recipients

Add Note Recipient:  Lookup Clear

Note Recipients Grid

Name	Date Sent	Date Read	Status	Date Signed
------	-----------	-----------	--------	-------------

x. In the Search Text: add the recipient's last name. Press Search

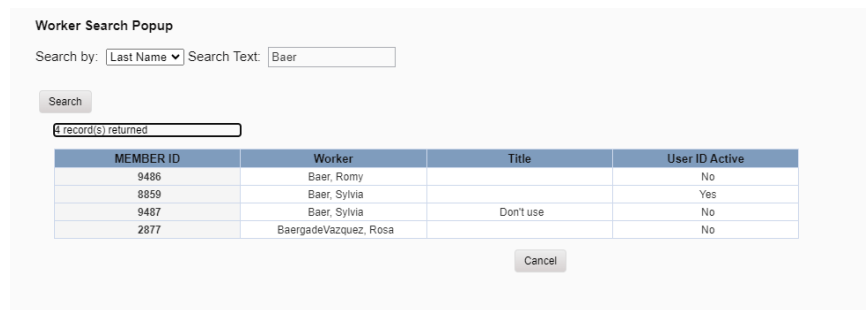


Worker Search Popup

Search by: Last Name Search Text:

Search

xi. The list view grid of workers with that last name will display. Be mindful of the Title and if the User is active or not. If the User ID Active = No, do not select that worker. Click the appropriate worker to add them to the Note.



Worker Search Popup

Search by: Last Name Search Text:

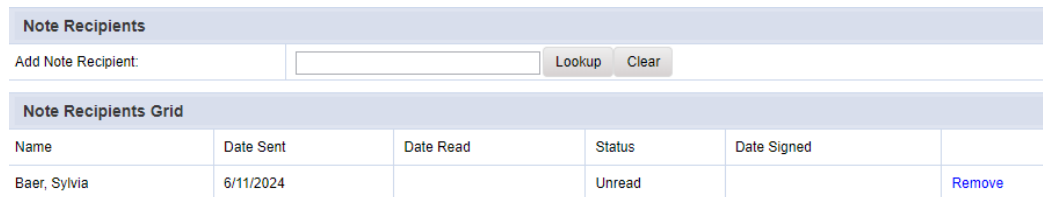
Search

6 record(s) returned

MEMBER ID	Worker	Title	User ID Active
9486	Baer, Romy		No
8859	Baer, Sylvia		Yes
9487	Baer, Sylvia	Don't use	No
2877	BaergadeVazquez, Rosa		No

Cancel

xii. Their name will be displayed in the Note Recipients Grid.



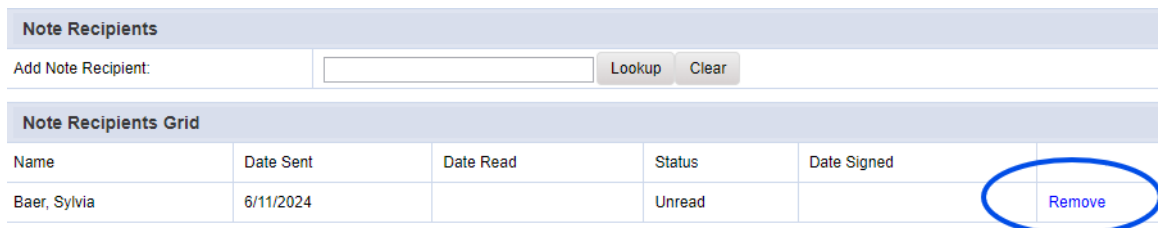
Note Recipients

Add Note Recipient:  Lookup Clear

Note Recipients Grid

Name	Date Sent	Date Read	Status	Date Signed	
Baer, Sylvia	6/11/2024		Unread		<a href="#">Remove</a>

xiii. To remove a Note Recipient, click the Remove hyperlink.



Note Recipients

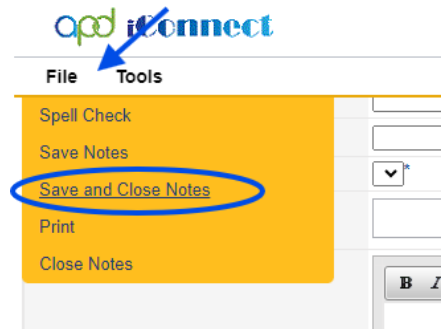
Add Note Recipient:  Lookup Clear

Note Recipients Grid

Name	Date Sent	Date Read	Status	Date Signed	
Baer, Sylvia	6/11/2024		Unread		<a href="#">Remove</a>

xiv. Repeat the steps needed to add any additional Note Recipients.

- k. Once done, go to **File > Save and Close Notes**

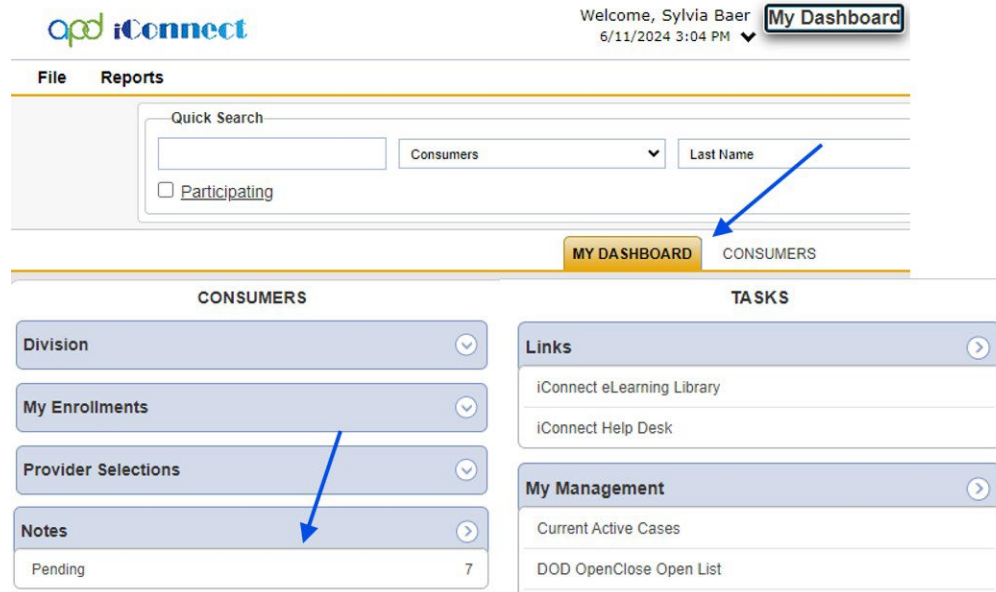


### Marking Notes as Read

Notes can be marked as Read from the Note itself or from the Note List View Grid.

### Marking Notes as Read from the Note

1. Once logged into iConnect, the Care Coordinator will land on the My Dashboard. Under CONSUMERS there is a heading titled "Notes." This will only display if there are Notes that the user has been added to as a Note Recipient and the Notes are not marked as Read.



If the caret is pointing down, click the caret to show the Pending or Complete Notes.



- Click the Pending or Complete under Notes. Once clicked, a list view grid will display all the Pending or Complete Notes.

apd iConnect

Welcome, Sylvia Baer 6/11/2024 3:10 PM **Notes**

File Tools

Filters

Status Equal To Pending AND X

iConnect ID +

Search Reset

7 My Dashboard Notes record(s) returned - now viewing 1 through 7

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
215761	Baer, Theodore	Cost Plan Review	Plan Validation Review	03/15/2024		Baer, Sylvia	Pending
215491	French, Kate	AIMs	Initiate AIM	03/07/2024		Chulig, Fanny	Pending
209730	Kastners, Martin	Facility Placement	Review Referral form	03/07/2023	Form for Martin Kastner to be reviewed for Placement	Pye, Travis	Pending
209636	Kersten, Tracy	Support Plan	Pre-Support Planning Activities	12/09/2021	Class Test	Brown-Ferrier, Mollie	Pending
215492	Maid, Mer	Cost Plan Review		03/07/2024		Central, WSC3	Pending
215523	Tide, Rollin	Confidential Documentation		11/03/2022	APD iConnect Scavenger Hunt	Central, WSC12	Pending
215522	Tide, Tim	Confidential Documentation		11/03/2022	APD iConnect scavenger hunt	Central, WSC11	Pending

- To view a Note, click the hyperlink to open the Note.

apd iConnect

Welcome, Sylvia Baer 6/11/2024 3:10 PM **Notes**

File Tools

Filters

Status Equal To Pending AND X

iConnect ID +

Search Reset

7 My Dashboard Notes record(s) returned - now viewing 1 through 7

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
215761	Baer, Theodore	Cost Plan Review	Plan Validation Review	03/15/2024		Baer, Sylvia	Pending
215491	French, Kate	AIMs	Initiate AIM	03/07/2024		Chulig, Fanny	Pending
209730	Kastners, Martin	Facility Placement	Review Referral form	03/07/2023	Form for Martin Kastner to be reviewed for Placement	Pye, Travis	Pending
209636	Kersten, Tracy	Support Plan	Pre-Support Planning Activities	12/09/2021	Class Test	Brown-Ferrier, Mollie	Pending
215492	Maid, Mer	Cost Plan Review		03/07/2024		Central, WSC3	Pending
215523	Tide, Rollin	Confidential Documentation		11/03/2022	APD iConnect Scavenger Hunt	Central, WSC12	Pending
215522	Tide, Tim	Confidential Documentation		11/03/2022	APD iConnect scavenger hunt	Central, WSC11	Pending

- The Note will display. If a response is needed (the user is only able to reply to a Pending Note, no edits can be made on a Complete Note), scroll to the Note section and in the New Text field, enter the needed text. Then press **Append Text to Note**.

Notes

An asterisk (\*) indicates a required field

**Notes Details**

Division \* APD

Note By \* Brown-Ferrier, Mollie

Note Date \* 12/09/2021

Program/Provider \* APD Waiver Details

Note Type \* Support Plan

Note Sub-Type Pre-Support Planning Activities

Description Class Test

On 12/9/2021 at 3:05 PM, Mollie Brown-Ferrier wrote:  
Testing to see if you receive this and respond

Note

New Text

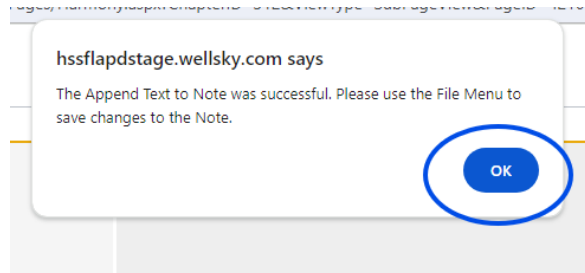
B I U 10pt A

Additional information here.

Append Text to Note

Status \* Pending

- After clicking Append Text to Note, a popup will display letting the user know that the Append Text to Note was successful and to save any changes. Press OK.



- The additional information keyed in will be displayed in the Note.

Description Class Test

On 12/9/2021 at 3:05 PM, Mollie Brown-Ferrier wrote:  
Testing to see if you receive this and respond  
On 6/11/2024 at 3:16 PM, Sylvia Baer wrote:  
Additional information here.

Note

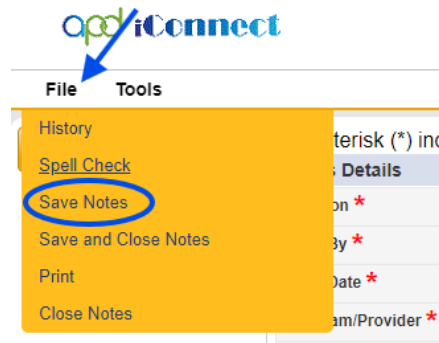
New Text

B I U 16px A

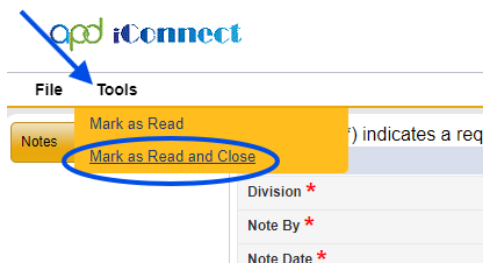
- c. To send the response to the individual, the individual needs to be added as a Note Recipient in the Note. Note Recipients can only be users of iConnect. If the Note Recipient is already on the Note with a Status of Unread, they will not be able to be added back to the Note. If they are marked as Read, they will need to be added back onto the Note for the Note to display on their My Dashboard.

Note Recipients					
Add Note Recipient:		<input type="text"/>	Lookup	Clear	
Note Recipients Grid					
Name	Date Sent	Date Read	Status	Date Signed	
Baer, Sylvia	03/07/2024		Unread		<a href="#">Remove</a>
Central, WSC1	12/09/2021		Unread		<a href="#">Remove</a>
Central, WSC2	12/09/2021		Unread		<a href="#">Remove</a>
Central, WSC3	12/09/2021		Unread		<a href="#">Remove</a>
Central, WSC4	12/09/2021		Unread		<a href="#">Remove</a>
Central, WSC5	12/09/2021		Unread		<a href="#">Remove</a>

- d. Once completed with the Note, go to **File > Save Notes**.



5. To mark the Note as Read, go to **Tools > Mark as Read and Close**. The Note will be off your My Dashboard, until added back as a Note Recipient.



## Marking Notes as Read from the Note List View Grid

- Once logged into iConnect, the Care Coordinator will land on the My Dashboard. Under CONSUMERS there is the heading titled, "Notes."



- Click the Pending or Complete under Notes. Once clicked a list view grid will display all Pending or Complete Notes.

apd iConnect

Welcome, Sylvia Baer 6/11/2024 3:10 PM **Notes**

File Tools

Filters

Status Equal To Pending AND X

iConnect ID +

Search Reset

7 My Dashboard Notes record(s) returned - now viewing 1 through 7

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status	
215761	Baer, Theodore	Cost Plan Review	Plan Validation Review	03/15/2024		Baer, Sylvia	Pending	<input type="checkbox"/>
215491	French, Kate	AIMs	Initiate AIM	03/07/2024		Chulig, Fanny	Pending	<input type="checkbox"/>
209730	Kastners, Martin	Facility Placement	Review Referral form	03/07/2023	Form for Martin Kastner to be reviewed for Placement	Pye, Travis	Pending	<input type="checkbox"/>
209636	Kersten, Tracy	Support Plan	Pre-Support Planning Activities	12/09/2021	Class Test	Brown-Ferrier, Mollie	Pending	<input type="checkbox"/>
215492	Maid, Mer	Cost Plan Review		03/07/2024		Central, WSC3	Pending	<input type="checkbox"/>
215523	Tide, Rollin	Confidential Documentation		11/03/2022	APD iConnect Scavenger Hunt	Central, WSC12	Pending	<input type="checkbox"/>
215522	Tide, Tim	Confidential Documentation		11/03/2022	APD iConnect scavenger hunt	Central, WSC11	Pending	<input type="checkbox"/>

- The checkboxes on the right can be selected individually or in mass by clicking the checkbox on the top.

apd iConnect

Welcome, Sylvia Baer 6/11/2024 3:10 PM **Notes**

File Tools

Filters

Status Equal To Pending AND X

iConnect ID +

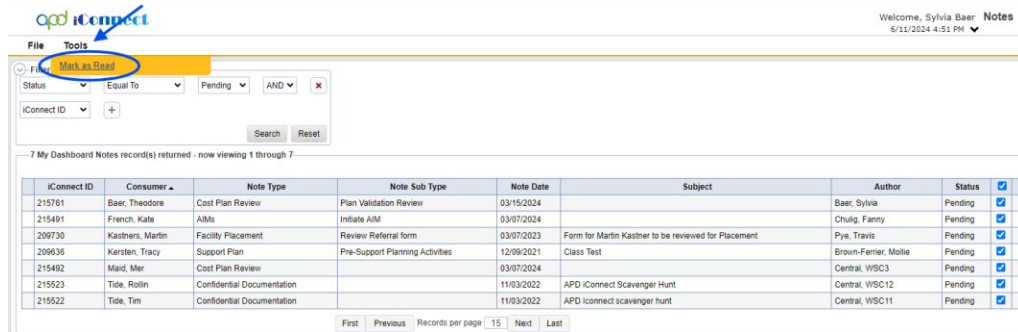
Search Reset

7 My Dashboard Notes record(s) returned - now viewing 1 through 7

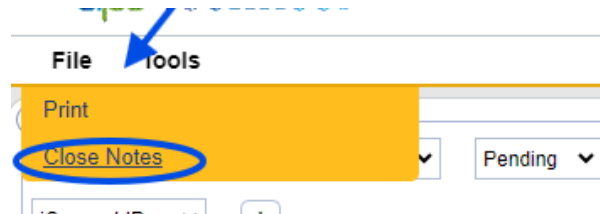
iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status	<input type="checkbox"/>
215761	Baer, Theodore	Cost Plan Review	Plan Validation Review	03/15/2024		Baer, Sylvia	Pending	<input type="checkbox"/>
215491	French, Kate	AIMs	Initiate AIM	03/07/2024		Chulig, Fanny	Pending	<input type="checkbox"/>
209730	Kastners, Martin	Facility Placement	Review Referral form	03/07/2023	Form for Martin Kastner to be reviewed for Placement	Pye, Travis	Pending	<input type="checkbox"/>

4.

- Once the proper Notes have been selected, navigate to **Tools > Mark as Read**.



6. The Notes selected will be cleared from the My Dashboard; however, they will still be in the client's record > Notes tab within iConnect.
7. To close the Notes List View Grid, go to **File > Close Notes**.



## Chapter 10 | Ticklers

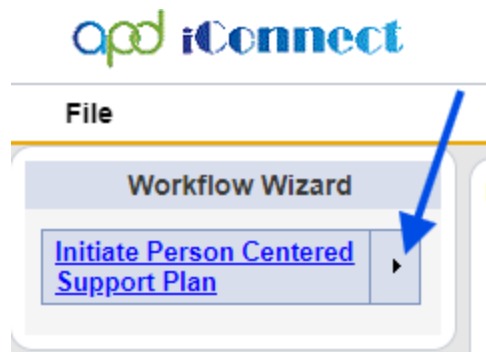
### Introduction

Ticklers are a feature in iConnect. The workflows for our DDMC Care Coordinators do not require Ticklers. If there is a Tickler that displays on the My Dashboard, the Care Coordinator can either Cancel or Complete the Tickler to get the Tickler off of the My Dashboard.

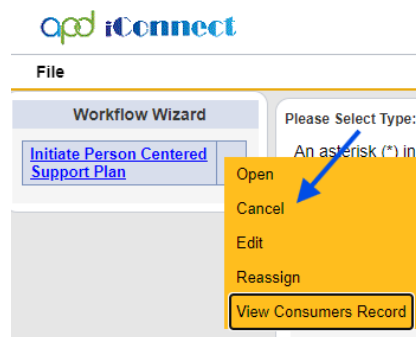
### Ticklers from Workflow Wizard

Complete the following steps to remove any Ticklers:

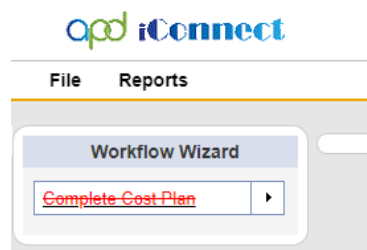
1. If a Tickler pops-up from a Workflow Wizard, simply navigate to the caret to display a menu option.



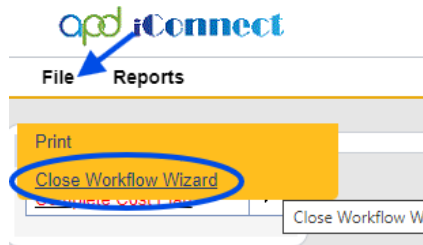
2. Depending on the options that are available, select Cancel, Delete or Complete.



3. Once the appropriate option is selected, the Tickler will be crossed out and deleted from the My Dashboard.



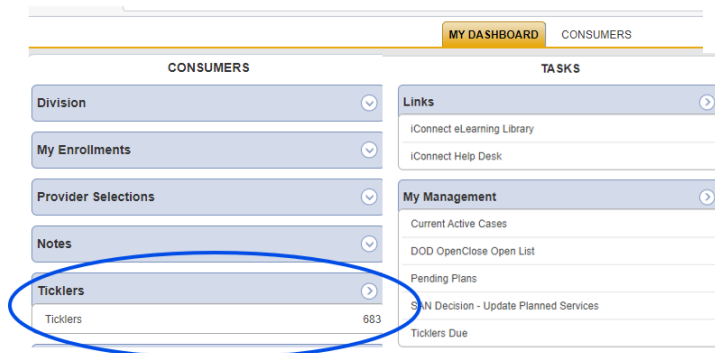
- Once done, go to **File > Save and Close Workflow Wizard**



## Ticklers on My Dashboard

Complete the following to remove any Ticklers from the My Dashboard:

- On the My Dashboard, navigate to the Ticklers menu under Consumers and click to open the list view grid.



- Once the list view grid is opened, navigate to the caret at the end of the record displayed. The pop-up menu will display. Select Cancel, Complete or the Delete option.



- Once selected, the Tickler will be removed from the list grid view.
- When all ticklers are deleted, go to **File > Close Ticklers**

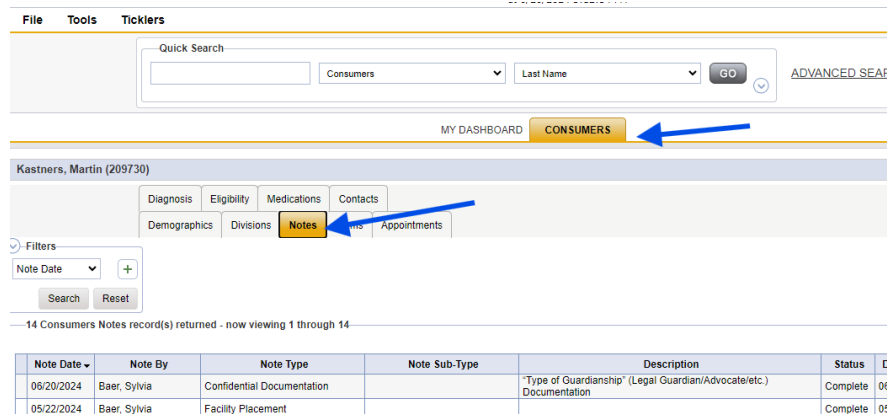
## UPDATED: Chapter 11 | Personal Disaster Plan Note

### Introduction

The Care Coordinator will ensure that the Disaster Plan is current in iConnect for their clients and at least once a year, the Care Coordinator will upload the Disaster Plan as a Note in iConnect.

### Creating a Disaster Plan Note

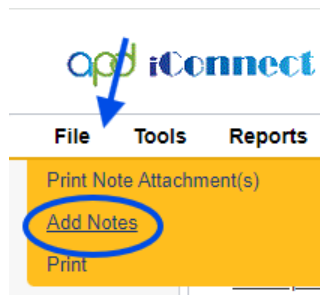
- Once the Disaster Plan has been completed, the Care Coordinator will log into iConnect and set Role to **DDMC**. The Care Coordinator will navigate to the client's record and select the **Notes** tab.



The screenshot shows the iConnect interface. At the top, there is a navigation bar with 'File', 'Tools', and 'Ticklers'. Below this is a search bar with a 'Quick Search' field, a dropdown menu set to 'Consumers', and a 'Last Name' dropdown. A blue arrow points to the 'CONSUMERS' button in the 'MY DASHBOARD' section. Below the dashboard, the client record for 'Kastners, Martin (209730)' is displayed. The 'Notes' tab is selected, and a blue arrow points to it. Below the tabs, there is a 'Filters' section with a 'Note Date' dropdown and 'Search' and 'Reset' buttons. A message indicates '14 Consumers Notes record(s) returned - now viewing 1 through 14'. A table of notes is shown below:

Note Date	Note By	Note Type	Note Sub-Type	Description	Status
06/20/2024	Baer, Sylvia	Confidential Documentation		"Type of Guardianship" (Legal Guardian/Advocate/etc.) Documentation	Complete 06
05/22/2024	Baer, Sylvia	Facility Placement			Complete 05

- The list view grid of all Notes created in the client's record will display. To create a new Note, go to **File > Add Notes**.



- Fill out the Note fields as follows:
  - Division = APD
  - Note By = defaults to worker's name
  - Note Date = defaults to today's date
  - Note Type = Personal Disaster Plan
  - Note Sub-Type = leave blank
  - Description = as needed
  - Note = as needed

- h. Status = Complete
- i. Add Attachment = Add the Personal Disaster Plan

**Notes Details**

Division \* APD

Note By \* Baer, Sylvia

Note Date \* 04/22/2025

Program/Provider Details

Note Type \* Personal Disaster Plan

Note Sub-Type

Description Disaster Plan

Note

Please see the Disaster Plan attached

Status \* Complete

Date Completed 04/22/2025

**Attachments**

Add Attachment

**Attachments Grid**

Document	Description	Category
PersonalDisasterPlan.pdf		

**Note Recipients**

Add Note Recipient: Lookup Clear

- j. Once done, go to **File > Save and Close Notes**

