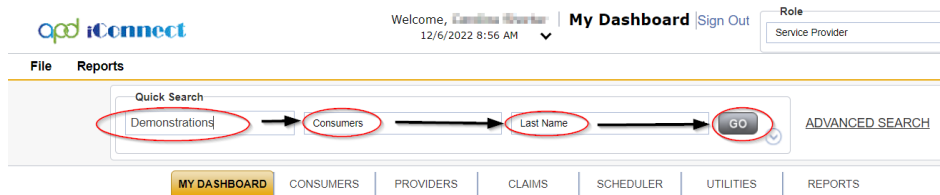


Including Staffing Documentation for Residential Providers as Notes

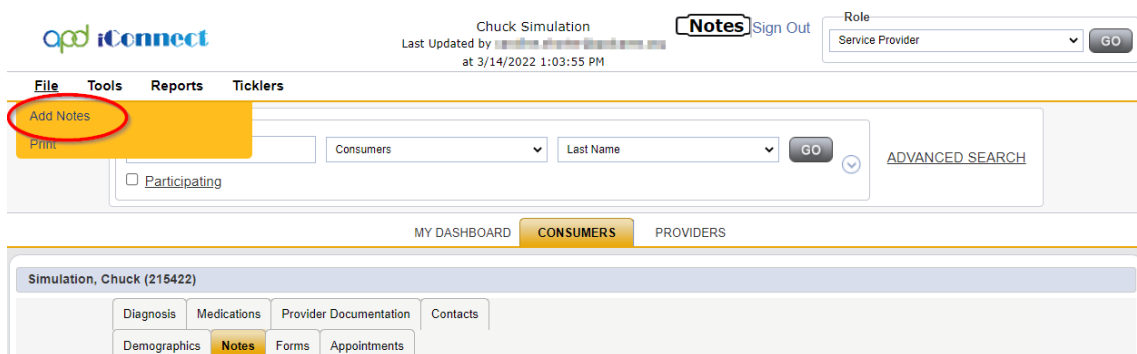
Staffing Documentation and any other documentation required for billing must be included in iConnect as a note.

Please refer to the [Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook](#) for specific documentation requirements.

1. To begin, log into iConnect and set Role = Service Provider or Service Provider Worker. Click **Go**
2. Navigate to the Consumer's Record
 - a. Type the consumer's last name in the Quick Search text field (1st field on the left)
 - b. Ensure that the second field contains Consumers, third field contains last name and click "Go"



3. Click the **Note** tab > click **File > Add Note**




4. The Note Details page is displayed. Update the following fields:

- a. Program/Provider = Name of your Agency

If the Program/Provider is not available – contact the WSC to have a Provider Selection Record for your organization added to the consumer's record.

- b. Note Type = Service Provider Supporting Documentation

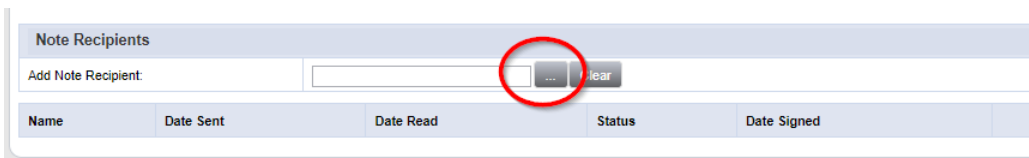
- c. Note Subtype = leave blank
- d. Description = The name of the documentation required
 - i. *Ex. Staffing Documentation [insert date]*

Notes Details	
Division *	APD ▼
Note By *	[Redacted] ▼
Note Date *	11/07/2023 
Program/Provider *	A Test Provider ▼ Details
Note Type *	Service Provider Supporting Documentation ▼*
Note Sub-Type	▼
Description	Staffing Documentation

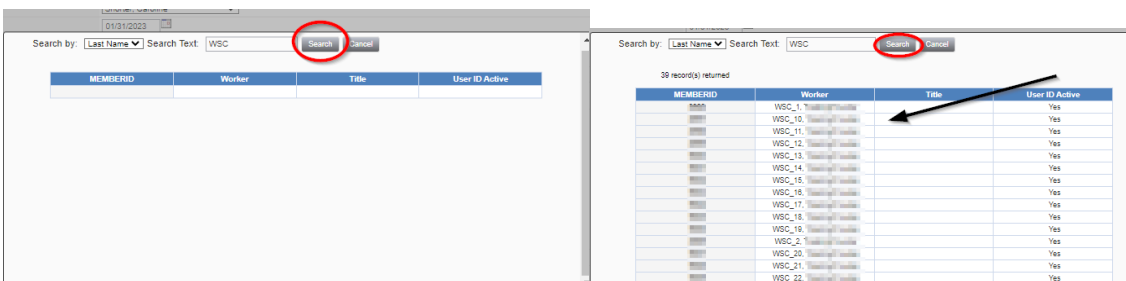
- e. Status = Complete
- f. Attach documents to this Note
 - i. Use the “Add Attachment” link provided to search for the documents on your desktop.
 - ii. File Upload Window opens, click the Choose File button, and locate the document on your computer’s local files.
 - iii. Select the File and click the open button
 - 1. The document is listed in the File field
 - a. OPTIONAL: Use the File Name and Description fields to update the name and description of the files, if needed
 - i. File Name = Select Create New & type the new name of the file.
 - 1. *Ensure that you include the file extension at the end of the file name*
 - a. *Ex. MayStaffing.pdf*
 - b. *Ex. MayStaffing.docx*
 - ii. Description = Type in a description in the text box
- iv. Click Upload
 - 1. The File will be listed as a Document.

IMPORTANT: When attaching a file in iConnect, please **do not include any punctuation or special characters in the name of the file**. This will ensure the file can be opened and viewed by other iConnect users, including Qlarant.

g. Note Recipient = Waiver Support Coordinator



- i. Use the Add Note Recipient ellipsis (three dots) button to open the worker search popup.
- ii. Type the WSC's last name and click the search button.
 1. A list people with the last name will appear in the grid below.
- iii. Double click on the WSC's name to include the WSC as a Note Recipient. In this example, we searched for individuals with the last name equal to WSC.
 1. The WSC's name will now appear in the last field as a Note Recipient.
 - a. If an error was made, delete the selection, and add a new note recipient.



MEMBERID	Worker	Title	User ID Active
MEM01	WSC_1	Waiver Support Coordinator	Yes
MEM02	WSC_10	Waiver Support Coordinator	Yes
MEM03	WSC_11	Waiver Support Coordinator	Yes
MEM04	WSC_12	Waiver Support Coordinator	Yes
MEM05	WSC_13	Waiver Support Coordinator	Yes
MEM06	WSC_14	Waiver Support Coordinator	Yes
MEM07	WSC_15	Waiver Support Coordinator	Yes
MEM08	WSC_16	Waiver Support Coordinator	Yes
MEM09	WSC_17	Waiver Support Coordinator	Yes
MEM10	WSC_18	Waiver Support Coordinator	Yes
MEM11	WSC_19	Waiver Support Coordinator	Yes
MEM12	WSC_2	Waiver Support Coordinator	Yes
MEM13	WSC_20	Waiver Support Coordinator	Yes
MEM14	WSC_21	Waiver Support Coordinator	Yes
MEM15	WSC_22	Waiver Support Coordinator	Yes

h. File > Save and Close Note

Notes Details

Division *

Note By *

Note Date *

Program/Provider * [Details](#)

Note Type *

Note Sub-Type

Description

Note

Status *

Date Completed

Attachments

[Add Attachment](#)

Document	Description	Category	Action
StaffingMAY.docx	Staffing Documentation as required in Appendix A		Remove

Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed	
WscPlaceholder, Suncoast	1/31/2023		Unread		Remove