

**May 1, 2024**

## **Identifying Multiple Workers with the Same Name**

Do you have a hard time identifying between multiple workers with the same name? Are you a user who works for multiple organizations? Ask your manager/supervisor with the Service Provider Role to assign a title to your Worker Record within iConnect! They can use the Agency name to help identify the correct record.

The screenshot displays the iConnect web application interface. At the top, the 'iConnect' logo is on the left, and the user's role is 'Service Provider' with a 'GO' button. The main navigation bar includes 'MY DASHBOARD', 'CONSUMERS', and 'PROVIDERS'. The 'PROVIDERS' tab is selected, showing a list of providers. A modal window titled 'Worker' is open, displaying the details for a worker named 'Caroline Shorter'. The 'Title' field is highlighted with a blue oval and labeled 'Provider - 18915'. An arrow points to this field from the right side of the screen.

Worker	Member ID	Last Name *	First Name *	Title	Business Address	Business Address 2	City	State	Zip Code
Caroline Shorter	2427	Shorter	Caroline	Provider - 18915	1313 W. TAMPA ST	SUITE 515	TAMPA	FL	33602

## **Missing EVV Activities/Provider Documentation Activities**

Have you identified missing Provider Documentation Activities? The Service Provider Role has the necessary permissions to delete existing documentation records. As an agency owner, if you feel that these permissions are unnecessary for your staff, manage their user accounts and remove the Service Provider role from their profile.

apd iConnect

Blonde Simulation  
Last Updated by caroline.shorter@apdcares.org  
at 2/15/2024 8:37:08 AM

Provider Documentation

File

- History
- Spell Check
- Save Provider Documentation
- Save and Close Provider Documentation
- Print
- Close Provider Documentation
- Delete Provider Documentation

Start Time	End Date *	End Time	Total Minutes	
1:00 PM	8/25/2023	2:00 PM	60	Delete
	08/25/2023			Add

PA Number

Activity Details

Division: APD Worker\*

Provider: Simulation Behavior Provider Status

Have you identified missing EVV Activities? The Provider EVV Manager Role has the necessary permissions to delete existing EVV records. As an agency owner, if you feel that these permissions are unnecessary for your staff, manage their user accounts and remove the Provider EVV Manager role from their profile.

apd iConnect

Simulation EVV Provider 2022  
Last Updated by evvinfo.hamm@apdcares.org  
at 3/31/2023 2:24:28 PM

Activities

File

- History
- Save
- Save and Close
- Spell Check
- Delete
- Print
- Close Activities

Start Time	End Date *	End Time	Total Minutes	
2:24 PM	3/31/2023	2:24 PM	0	Delete
	03/31/2023			Add

257503 Consumer First Name \* Holly

iConnect ID \* 209648 Consumer Last Name \* Bohl

Activity Details

## Need to Update a Record in Complete Status?

Have you made a mistake when entering a note, form, or provider documentation and saved it in Complete Status in error? The Service Provider Role has the necessary permissions to “Unlock Record,” “Reverse Status,” or “Reverse Disposition.” This option changes the status back to “Draft” or “Pending” so that edits can be made.

apd iConnect

Blonde Simulation  
Last Updated by behavior.simulation@apd.direct  
at 9/19/2023 4:48:56 AM

Notes

File Tools

- History
- Spell Check
- Unlock Record
- Print

APD

Simulation, Behavior

09/19/2023

qpd iConnect

Blonde Simulation  
Last Updated by caroline.shorter@epdcanes.org  
at 2/15/2024 9:22:38 AM

Forms

File

History

Duplicate Forms

Reverse Status

Print

Close Forms

Division \*

APD

Approved By

Shorter, Caroline

Details

Worker \*

Shorter, Caroline

Details

Status \*

Complete

Provider/Program \*

HelloFreshly

Details

Approved Date

02/15/2024

qpd iConnect

Blonde Simulation  
Last Updated by Behavior.Simulation@apd.direct  
at 8/26/2023 5:53:35 PM

Provider Documentation

File

History

Spell Check

Reverse Disposition

Print

Close Provider Documentation

Start Time	End Date *	End Time	Total Minutes	Rounded #
4:00 PM	7/29/2023	7:00 PM	180	180
	07/29/2023			

## Using Filters

Have you been using iConnect for some time and are having challenges in locating specific records? Use the Filter Options available within most tabs/pages in iConnect. If performing a word search, update the criteria to “Contains” and type the word that is being searched.... Or type the first three letters of what needs to be searched, then click “Search”.

MY DASHBOARD CONSUMERS

Simulation, Barbie (215485)

Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Mod

Demographics Divisions Consumer Budgets Programs Provider Selections SAN Notes

Filters

Key Word

Contains

Legal Representative

AND

Note Date

+

Search

Reset

11 Consumers Notes record(s) returned - now viewing 1 through 11

oood iConnect

Welcome, Caroline Shorter Ticklers  
2/15/2024 8:50 AM

File

Filters

Ticker Name   
 Contains   
 Support Plan   
 AND   
 iConnect ID   
 Apply Alert Days Before Due   
 Search   
 Reset

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To

## Identifying where the Support Plan is from the Waiver Support Coordinator (WSC)

The WSC must send providers the Support Plan using a note in iConnect. In the My Dashboard chapter, under the Consumers column is a section for Notes for either Pending or Complete. Open the hyper link in the Notes section to view the Notes. There should be a note with the Note Type: Support Plan and Note Sub-Type: Provider Copy. Once you, as the provider, retrieve that Support Plan, leave this Note as unread so that you may refer back to that attached Support Plan whenever you need it. Leave the Note in Pending if it was sent in Pending.

File Reports

Quick Search

Consumers

MY DASHBOARD

CONSUMERS

Division

My Enrollments

Provider Selections

Notes

Complete	1
Pending	6



Do you see an Alert Note pop-up every time you open a consumer's record? Evaluate the Note to see if it is for a consumer death or change in WSC. If it is not for either of those cases, then the Note needs to be updated to "Complete" Status. This update be completed by all roles. If you are unsure if the Note should be updated, contact your regional trainer.

The screenshot shows the iConnect interface for a consumer record. The consumer is 'Crunch, Capt'n (215479)'. The 'Alert Notes' pop-up window is open, displaying the following information:

Alert Notes: Capt'n Crunch	
NoteDate	02/15/2024
NoteBy	Caroline Shorter
NoteType	Service Provider Supporting Documentation
Subject	Provider Documentation for the month of May
Notes	
Last Updated On	2/15/2024 11:44:24 AM
Last Updated By	caroline.shorter@apdcare.org

Below the pop-up, the consumer's demographics are visible:

Demographics	
iConnect ID	215479
Salutation	
Last Name	Crunch
First Name	Capt'n
Consumer Photo	
Middle Name	
Marital Status	Single/Never Married
Living Setting	Family Home

The screenshot shows the iConnect interface for a consumer record. The 'Notes' section is open, displaying a list of notes. The 'Status' dropdown menu is open, showing the following options:

- Alert
- Pending
- Complete
- Draft

The 'Complete' option is highlighted with a blue circle and an arrow pointing to it.

**June 1, 2024**

## Need to Know There Is A Provider Selection for Your Organization

Have you contacted the Waiver Support Coordinator and are eagerly waiting for the provider selection record to be added to the consumer's record? Once the provider selection record is created, you will see the record from My Dashboard as a "Provider Selection" and from the Provider Chapter within the "Enrollments Tab".



opd iConnect Welcome, Caroline Shorter 2/15/2024 11:33 AM My Dashboard Sign Out Role: Service Provider

File Reports

Quick Search:  Consumers  Last Name  GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS PROVIDERS

CONSUMERS PROVIDERS TASKS

Provider Selections

Admitted	2
Closed	5
Open	29

Links

- Connect eLearning Library
- Connect Help Desk

Simulation Provider Last updated by caroline.shorter@opdcares.org at 12/9/2022 10:51:02 AM Enrollments Sign Out

File

Quick Search:  Providers  Provider Name  GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS PROVIDERS

Simulation Provider (25978)

Workers Services Provider ID Numbers Beds Linked Providers Service Area

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

Filters

Disposition  Not Equal To  Closed  AND

Enrollment Date  +

Search Reset

4 Providers Enrollments record(s) returned - now viewing 1 through 4

Division	iConnect ID	Consumer	Enrollment Date	Worker	Disposition	Discharge Date	Expected Discharge Date
APD	215552	Demonstrations, Lyle		Shorter, Caroline	Open		
APD	259394	Hassett, Cecile		Dejoe, Beatrice	Admitted		
APD	215410	Pizza, Pepparoni		Shorter, Caroline	Open		
APD	215485	Simulation, Barbie	10/01/2023	Shorter, Caroline	Open		

## How Can I Change a Note in iConnect That Is Grayed Out?

If you see a Note in iConnect and you need to respond; however, you are unable to make any edits, you will want to check the status of that Note. If the Note is in Draft status, only the creator can make edits. Reach out to the creator of that Note and notify them that the Note needs to be in Pending status if a response is required. If the Note is in Complete status, a Help Desk Ticket will need to be created to determine if the status can be reversed. Depending on the workflow, a new Note may be required to be made. Not all Notes will be reversed if they are in the Complete status.

File Tools

Notes

An asterisk (\*) indicates a required field

Notes Details

Division *	APD
Note By *	Provider, Sylvia
Note Date *	02/19/2024
Program/Provider	1 CARE LLC Details
Note Type *	Supported Living *
Note Sub-Type	Signed Implementation Plan
Description	Signed Implementation Plan
Note	<p>On 2/19/2024 at 10:04 AM, Sylvia Provider wrote: Notes</p>
Status *	Draft
Date Completed	

opd iConnect

File Tools

Notes

An asterisk (\*) indicates a required field

Notes Details

Division *	APD
Note By *	Provider, Sylvia
Note Date *	02/19/2024
Program/Provider	1 CARE LLC Details
Note Type *	Supported Living *
Note Sub-Type	Signed Implementation Plan
Description	Signed Implementation Plan
Note	<p>On 2/19/2024 at 10:04 AM, Sylvia Provider wrote: Notes</p>
Status *	Complete
Date Completed	02/19/2024
Provider Referral Response	
Referred Provider	
Attachments	

## How To Know if Notes Have Been Read




If you want to ensure a Note has been “Read,” navigate to the Notes Tab of the record you want to verify (Provider Notes will be in the Provider Record and Consumer Notes will be in the Consumer Record). Open the Note and scroll down until you come to the Note Recipients. Listed under the Note Recipients you will see a list of names and their Status. In the Status, you can verify if the Note was “Read” or still “Unread.” The grid also informs you of when the Note was marked as “Read” and when it was “Sent.” If you notice that the Note was marked “Read” and you need that recipient to respond again, it is very crucial that you add them as a Note Recipient again.

\*It is important that users mark Notes as “Read” when they have read/completed the needed task associated with the Note. This way the users can add them as a Note Recipient again if needed. **If you mark a Support Plan or Support Plan Provider Copy Note as “Read,” you will no longer have access to that Note.**

Note Recipients					
Add Note Recipient:		<input type="text"/>	<input type="button" value="Clear"/>		
Name	Date Sent	Date Read	Status	Date Signed	
Appleton, Susan	02/19/2024		Unread		<a href="#">Remove</a>
Baer, Sylvia	08/30/2022	02/19/2024	Read		
Baer, Sylvia	2/19/2024		Unread		<a href="#">Remove</a>

## How To Get Rid of Ticklers On Your Dashboard

To remove a tickler from the Dashboard, click on the tickler pane to open the list view grid, on the right, hover the mouse cursor over the carat to open the menu of options, select Cancel or Complete and the Tickler will be removed from the my Dashboard count.


Welcome, Caroline Shorter
3/5/2024 2:44 PM
Ticklers

---

File

Filters

Status

Equal To

New

AND

+

iConnect ID

+

Apply Alert Days Before Due

Search

Reset

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

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Cals, HoneyBunches	215475	Send Application Acknowledgement Letter - Additional Info Needed	02/02/2022	02/02/2022		New	
Consumer, New	215481	Approved Professional Application Review is Complete - Close the Plan Record	02/03/2022	02/03/2022		New	
Consumer, New	215481	Assign Initial QSI	02/03/2022	02/03/2022		New	
Church, Cap'n	215475	Initiate and/or Update the Cost Plan	02/08/2022	02/08/2022		New	

Cancel

Complete

View Consumers Record

## Need A Transcript of TRAIN Course Modules in Writing

If you want to review the “Script”, aka Transcript of the TRAIN Florida Course Module, you can navigate to the Resources and locate the document with “Script” in the Title. Download, open and/or that pdf to follow along with the training course.



<a href="#">About</a>	<a href="#">Contacts</a>	<a href="#">Reviews</a>	<a href="#">Resources</a>	<a href="#">Discharge</a>	<a href="#">Communications</a>
Resource					Date Posted
<a href="#">APDiConnectTherapeuticProviderScript.pdf</a>					27 Feb 2023
<a href="#">APDiConnectTherapeuticSimulationAid.pdf</a>					8 Feb 2024
<a href="#">ProviderDocumentationJobAid.pdf</a>					8 Feb 2024
<a href="#">AssessmentsJobAid.pdf</a>					8 Feb 2024

**July 1, 2024**

### **Attaching Documents From Outside of iConnect**

Do you have additional information that you need to include in the Consumer or Provider record? Use the Note tab in either record to add a new note. Complete the required fields in accordance to the workflow you are following. Use the Add Attachment link to open the File Upload Form window. Click “Choose File” and locate the document from your device. Attachments can only be added within Notes.

iConnect

Barbie Simulation Notes

3/12/2024 12:19 PM

File

Tools

Notes Details

Division \*

APD

Note By \*

Shorter, Caroline

Note Date \*

03/12/2024

Program/Provider \*

Simulation Provider

Details

Note Type \*

Service Provider Supporting Documentation

Note Sub-Type

Description

Prescription

B

I

U

16px

A

Note

Status \*

Date Completed

Attachments

Add Attachment

Attachments Grid

Document

File Upload Form - Work - Microsoft Edge

https://hssflapdstage.wellsky.com/training-humanservices/Dialogs/FileUploadForm.aspx?Chapte...

File

Choose File

MOCK.DOC.docx

File Name

from uploaded file

create new

Description

Category

Upload

Upload and Add Another

Note: Maximum size for attachment is set to 18.46 MBytes.

Description

Category

Action

## Viewing History in iConnect

Is there a way to review the history of a page within iConnect? Use the “History” option under File on most screens within iConnect to see how changes were made. The example below shows the history of a planned service. There are two records within the history screen. Toggle through the pages to see what changes were made to the planned service.

It is important to note that you will only see the toggle to view different pages in the history if the item has been saved more than once.

**File**

- Spell Check
- History
- Print
- Close Planned Service

(\*) indicates a required field

Services

APD

2022

Begin Date 11/12/2021

End Date 06/30/2022

Index/SubObject Code \*

Index / SubObject			
Index Code	Index Description	SubObject	SubObject Description
SunCoast	SunCoast Region	Waiver	iBudget Waiver

Service Ratio

Consumer County \* HILLSBOROUGH

Geographic Differential \* Non-Geographic

Provider Rate Type \* Agency

Service Code \* G9012 UC

Service Description (4276) Support Coordination

Unit Type Month

Units Per \* 1

Units of Measure \* Month - Round Up

**File**

Service Description (4276) Support Coordination

Unit Type Month

Units Per \* 1

Units of Measure \* Month - Round Up

Total No of Units 8

Annualized Units \*

Provider ID \* 28927

Provider Suncoast Region Specific Agency

Rate \* \$148.69

Max Amount \* \$1,185.52

Amount Requested

Authorization Notes/Comments \* comments

Contract Number

Non-Taxable False

Planned Service Status State Review Approved

Allow EVV Delivery False

EVV Comments

Disable False

First Previous Record 1 of 2 Next Last

## Unable to See Workers in iConnect

When reviewing the list of workers within my Provider Record, I'm not able to see an employee. The employee reports as having signed into iConnect. What is going on? It is likely that your employee has multiple employments and may be signing into an account created by another organization. You will need to use the ID Proofing Admin

Security to grant this employee access through your organization.

Simulation Provider (29081)

Workers Services Provider ID Numbers Beds Linked Providers Service Area

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

Filters

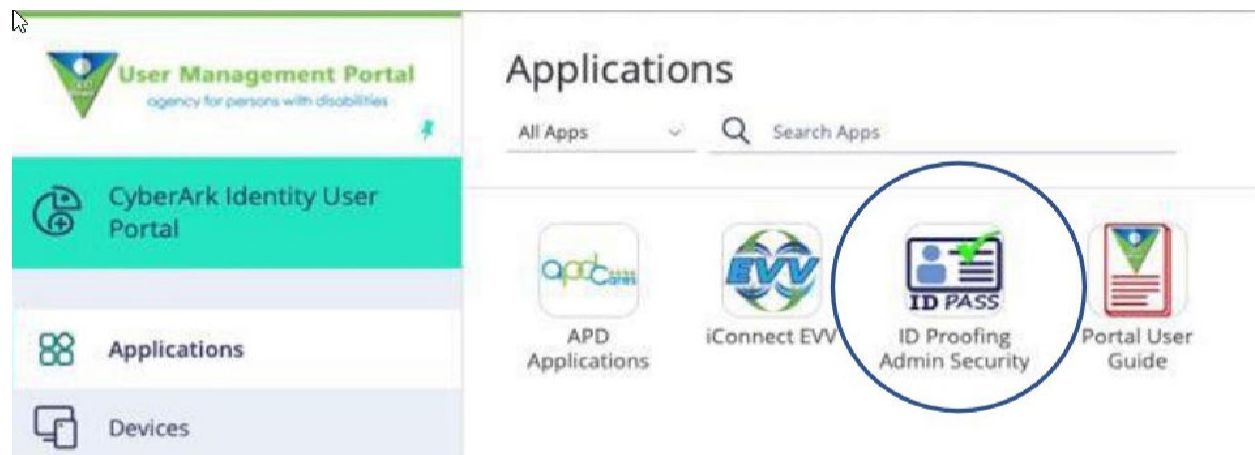
Worker Name +

Search Reset

4 Providers Workers record(s) returned - now viewing 1 through 4

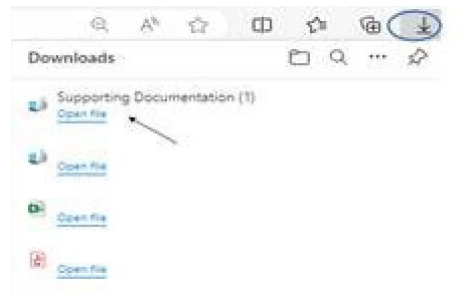
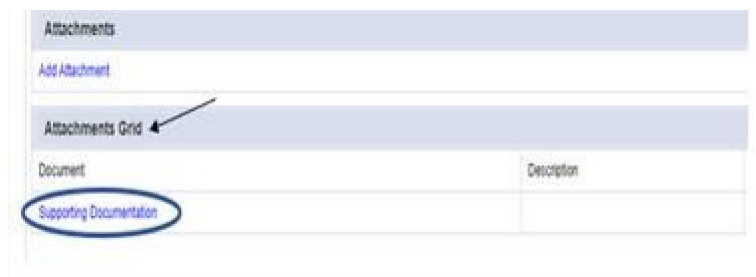
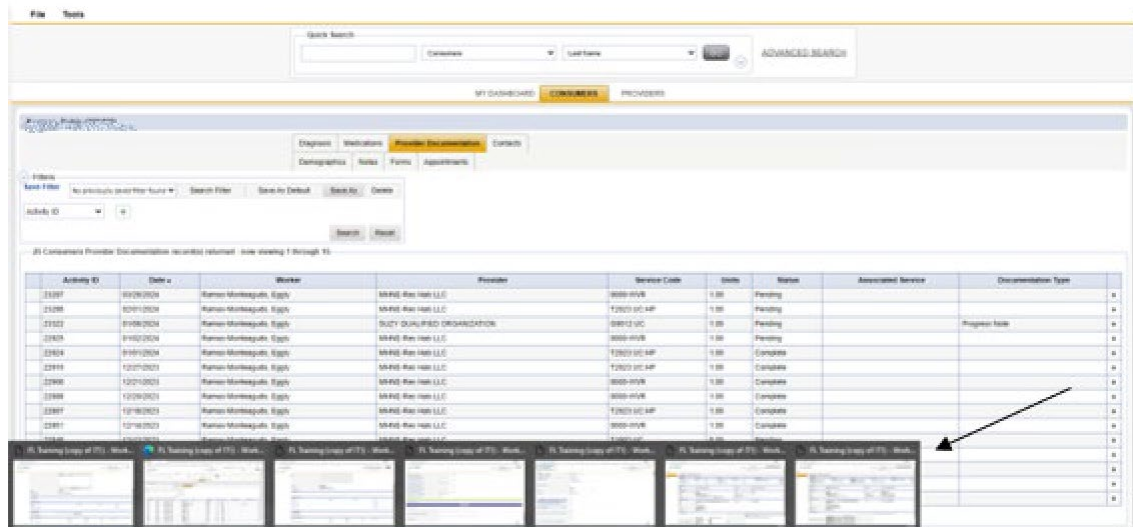
Worker Name	Title	Phone Number
John Smith		
John Smith	iConnect System Administrator	916-520-0000
Simulation Staff		
Simulation Staff		

First Previous Records per page 15 Next Last



## Time-Out Feature in iConnect

Have you been timed out of iConnect while you have several windows open, causing you to complete the authentication steps again? iConnect system will time-out if no activity has been detected after 90 minutes. When working in iConnect, close those windows that are not in use and download to your device those documents that need to be reviewed.



**August 1, 2024**

## **Division Tab – Locating WSC’s Contact Information for Client**

A new enhancement has been implemented in iConnect that now allows the Service Provider and Service Provider Worker roles to access the Division tab of the clients that they have authorizations for in iConnect. This will allow the Service Provider and the Service Provider Worker to find details of the WSC for that client. The Division tab is maintained by APD staff. The WSC’s information in iConnect is maintained by the Service Providers of the Qualified Organization that employs the WSC. To locate the



details for the client's WSC, navigate to the client's record in iConnect. Then click the Divisions tab. The list view grid will display the "APD Eligible – Waiver" hyperlink. Once the hyperlink is clicked, a pop-up will display with the Primary Worker. Click "Details" next to the Primary Worker's name. A pop-up will display the business phone number, and the email address of the WSC.

The image illustrates the process of navigating through the iConnect system to find a client's WSC details. It consists of four numbered steps:

- Step 1:** The main iConnect dashboard is shown. The 'Divisions' tab is highlighted in the top navigation bar.
- Step 2:** The 'Divisions' list view is displayed. It shows a table with columns: Division, Disposition, Primary Worker, and Secondary Worker. The 'APD Eligible - Waiver' entry is highlighted.
- Step 3:** A pop-up window titled 'An asterisk (\*) indicates a required field' is shown. It displays details for the 'APD Eligible - Waiver' division, including a 'Details' link for the Primary Worker.
- Step 4:** A 'Harmony Entity Viewer' window is shown, displaying detailed information for the Primary Worker. The information includes:
 

Member ID	25764
Last Name	WSC
First Name	Sylvia
Title	
Business Address	5100 W KENNEDY BLVD STE 152
City	TAMPA
State	FL
Zip Code	33609
Business Phone	(855)555-5555
Extension	
Fax Number	
Business Email	sylvia25764@email.com
Start Date	
End Date	
Supervisor	
Active	True

## Characters Available on Form Text Fields in iConnect

Is there a way to see the character limits within iConnect?


When working within a form, there is usually an indicator of how many characters are available within a text field. This is not available within the Notes but IS available with provider documentation. As you type into the boxes, these characters remaining will countdown to zero.


Blonde Simulation Forms  
3/15/2024 6:07 PM

File

Preliminary statement of problem behaviors, relevant consumer description, living situation, daily routine, health issues, other relevant details: \*

4000 characters remaining


Blonde Simulation Provider Documentation  
3/15/2024 6:10 PM

File

**Activity Details**

Division
Worker\*
Shorter, Caroline
Lookup Clear Details

Provider
Status
Pending

**Activity Services**

Service \*
Units \*
Rate
Secondary Code
Unit Type

Clear
Total Cost

**Documentation**

Provider Documentation Type \*
Annual Report
Daily Attendance Log
Monthly R&B
Monthly Summary
Progress Note
Quarterly Summary
Service Log

Note

50000 characters remaining

## How do I access the Service Desk Ticket that my staff has submitted?

When your employee signs into the Service Desk to add a new Ticket, they can include you as the cc: and then you will receive a copy of the ticket and subsequent updates

through your e-mail.

opod itconnect

CC

Title

Department

Requester Type

Requester Phone

Consumer Connect ID

Provider Connect ID

Cancel Create

## Can I generate a tickler?

WSCs and APD Staff have the opportunity to generate reminder ticklers of their own to manage their work. To do so, open the consumer's record, select the Ticklers menu option to open the list view grid. Use File to Add Ticklers Detail and complete the fields, then save to trigger the tickler for the Due Date selected.

opod itconnect

File Edit Tools Reports **Ticklers** Word Merge

Quick Search

Consumer Last Name

ADVANCED SEARCH

Simulation, Barbie (215488)

File

An asterisk (\*) indicates a required field

Manual Tickler

Tickler

Date Due

Assigned To

Message

Self Generated Reminder

Quarterly

06-08-2024

Shooter, Caroline

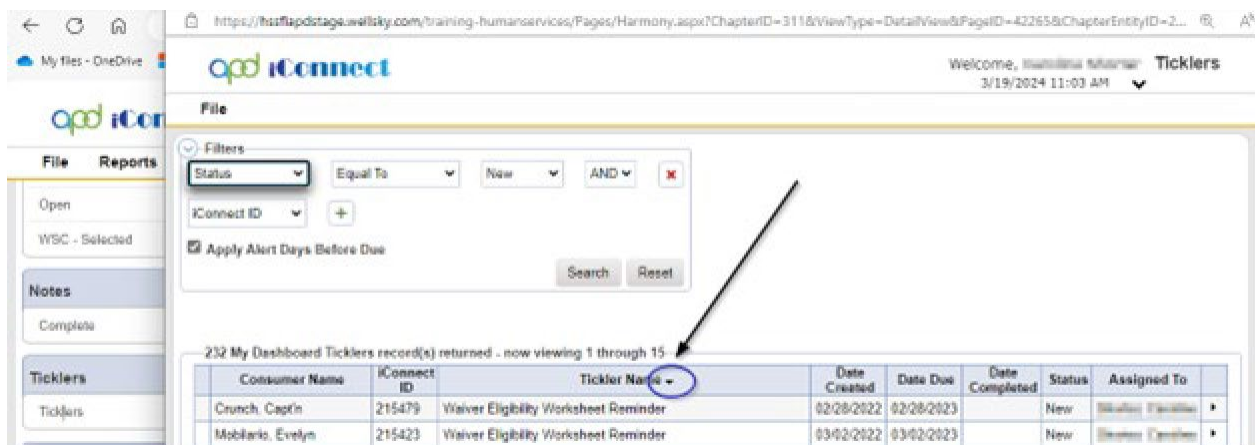
Victim

## How do I sort through my Ticklers?

Have you allowed your tickler list view to grow and now are having a challenge in prioritization? Use the sort feature and the filters to locate and prioritize your list of ticklers. You can sort the list by clicking on one of the headings (Consumer Name, iConnect ID, Tickler Name, Date Created, Due Date, Date Completed, Status, Assigned to).

The caret (▲) indicates that the list is in alphabetical order/oldest to newest/largest to smallest.

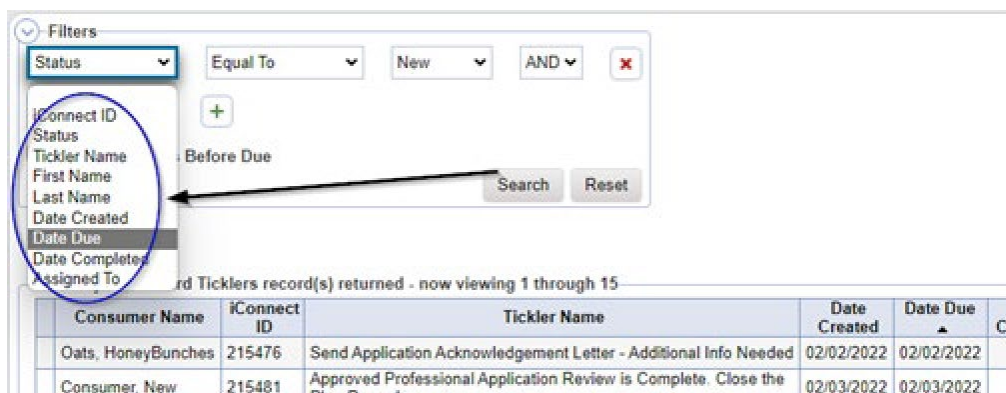
The caret (▼) opposite of alphabetical/newest to oldest/smallest to largest.



The screenshot shows the iConnect Ticklers interface. On the left is a sidebar with navigation options: File, Reports, Open, WSC - Selected, Notes, Complete, Ticklers, and Ticklers. The main area displays a 'Filters' section with dropdowns for Status, Equal To, New, and AND, along with a checkbox for 'Apply Alert Days Before Due'. Below the filters, a message states '232 My Dashboard Ticklers record(s) returned - now viewing 1 through 15'. A table lists ticklers with columns: Consumer Name, iConnect ID, Tickler Name, Date Created, Date Due, Date Completed, Status, and Assigned To. An arrow points to the 'Tickler Name' column header, which has a small downward arrow indicating it is the current sort order.

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Crunch, Cap'n	215479	Waiver Eligibility Worksheet Reminder	02/08/2022	02/08/2023		New	Sharon Canales
Moblaris, Evelyn	215423	Waiver Eligibility Worksheet Reminder	03/02/2022	03/02/2023		New	Sharon Canales

In addition, use filters to sort the data made available on the list view grid.



This close-up screenshot shows the 'Filters' dropdown menu. The menu is open, displaying a list of filterable fields: Status, iConnect ID, Tickler Name, First Name, Last Name, Date Created, Date Due, Date Completed, and Assigned To. The 'Date Due' field is highlighted with a blue selection bar. An arrow points to the 'Date Due' field in the list. Below the list, there are buttons for 'Search' and 'Reset'.

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Oats, HoneyBunches	215476	Send Application Acknowledgement Letter - Additional Info Needed	02/02/2022	02/02/2022		New	Sharon Canales
Consumer, New	215481	Approved Professional Application Review is Complete. Close the	02/03/2022	02/03/2022		New	Sharon Canales

**September 1, 2024**

## Deleting Provider Documentation

Is there a way to delete provider documentation?

Yes, if the record is in pending status, you are able to use the File menu to Delete Provider Documentation when you are using the Service Provider Role.

The screenshot shows the iConnect application interface. At the top, the logo 'apd iConnect' is on the left, and the title 'Blonde Simulation' with a subtitle 'Last Updated by caroline.shorten@apdcare.org at 2/13/2024 8:37:08 AM' is on the right. The main title 'Provider Documentation' is in a box at the top right. The 'File' menu is open on the left, showing options: 'Hist', 'File', 'Spell Check', 'Save Provider Documentation', 'Save and Close Provider Documentation', 'Print', 'Close Provider Documentation', and 'Delete Provider Documentation'. The 'Delete Provider Documentation' option is circled in blue, and an arrow points to it from the text 'Delete Provider Documentation' in the 'Activity Services' section. The form contains several sections: 'Start Time' (1:00 PM), 'End Date \*' (08/25/2023), 'End Time' (2:00 PM), and 'Total Minutes' (60). Below this is a table with columns 'PA Number' and 'Status'. The 'Status' column has a dropdown menu with 'Pending' selected. The 'Activity Details' section shows 'Division' as 'APD' and 'Provider' as 'Simulation Behavior Provider'. The 'Activity Services' section shows 'Service \*' as '0000-WVR', 'Units \*' as '1.00', 'Rate' as '\$0.00', and 'Secondary Code' as '0000-WVR'. The 'Documentation' section is at the bottom.

Start Time	End Date *	End Time	Total Minutes
1:00 PM	08/25/2023	2:00 PM	60

PA Number	Status
	Pending

**Activity Details**

Division	APD	Worker*	Simulation Behavior
Provider	Simulation Behavior Provider	Status	Pending

**Activity Services**

Service *	0000-WVR	Provider Additional Documentation	Clear	Total Cost	\$0.00
Units *	1.00				
Rate	\$0.00				
Secondary Code	0000-WVR				
Unit Type	Units				

**Documentation**

**October 1, 2024**

**Can I save Provider documentation while I'm in the middle of working on it?**

Yes, when working within iConnect, as long as the required fields are completed, the provider documentation record can be saved in case the user needs to step away to answer a phone call or attend to another matter.

Once the user is ready to finish the notes, return to the record and continue typing into the Note Field.

File

Provider Documentation

Claims

An asterisk (\*) indicates a required field

Activity Times

Rounding Rule: Nearest 15 min

Start Date *	Start Time	End Date *	End Time	Total Minutes	Rounded Minutes	
03/15/2024	1:00 PM	03/15/2024	2:00 PM	60	60	Delete
03/15/2024		03/15/2024				Add

Authorization

Auth ID: 257949 PA Number:

Activity Details

Division: APD Worker\*: Shorter, Caroline Lookup Clear Details

Provider: Simulation Behavior Provider Status: Pending

Activity Services

Service\*: [dropdown] Total Cost: \$15.00

Units\*: 4

Rate: [dropdown]

Secondary Code: [dropdown]

Unit Type: [dropdown]

Documentation

Provider Documentation Type \*

Annual Report  
Daily Attendance Log  
Monthly S&M  
Monthly Summary  
Progress Note  
Quarterly Summary  
Toolbox

Service Log

Note

**November 1, 2024**

**How do I clear out Notes that are listed on my Dashboard Screen?**

Open the Notes list view grid from my Dashboard. Select the notes by using the check boxes on the right side of the list view grid. Use the Tool menu dropdown to mark the note as read

**IMPORTANT: Service Providers that “Mark as Read” the Note containing the Support Plan will no longer have access to that Support Plan Note. They will need**



to reach out to the WSC to retrieve that Support Plan Note.

The screenshot shows the iConnect system interface. On the left sidebar, the 'Notes' tab is selected, indicated by a red box and arrow labeled '2'. At the top right, the 'MY DASHBOARD' tab is active, indicated by a red box and arrow labeled '1'. A notification banner at the top right says 'Welcome, Sylvia Baer' and 'Notes 9/23/2024 11:41 AM', with a red box and arrow labeled '4' pointing to the 'Notes' link. In the center, a 'Mark as Read' button is highlighted with a red box and arrow labeled '6'. Above this button, the 'iConnect' logo is visible, with a red box and arrow labeled '5' pointing to it. Below the 'Mark as Read' button, there are filters for 'Status' and 'iConnect ID', with a red box and arrow labeled '3' pointing to the 'Status' dropdown. At the bottom, a table displays 'My Dashboard Notes record(s) returned - now viewing 1 through 4'. The table has columns for iConnect ID, Consumer, Note Type, Note Sub Type, Note Date, Subject, Author, and Status. The first row shows a note for 'Bud, Grandpa' with status 'Complete'. The second row shows a note for 'Fritz, Uncle' with status 'Complete'. The third row shows a note for 'Fritz, Uncle' with status 'Complete'. The fourth row shows a note for 'Robinson, Franny' with status 'Complete'. A red box and arrow labeled '3' points to the 'Status' column header.

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
215832	Bud, Grandpa	APD Waiver Eligibility Verification	LOC Met/ Medicaid Eligible	08/15/2024		DDMC Worker4	Complete
215834	Fritz, Uncle	Support Plan	Documentation	08/15/2024	Disaster Plan	DDMC Worker6	Complete
215834	Fritz, Uncle	Confidential Documentation		08/15/2024	DDMC iConnect Scavenger Hunt - DDMC Worker6	DDMC Worker6	Complete
215831	Robinson, Franny	Support Plan	Documentation	08/15/2024	Disaster Plan	DDMC Worker3	Complete

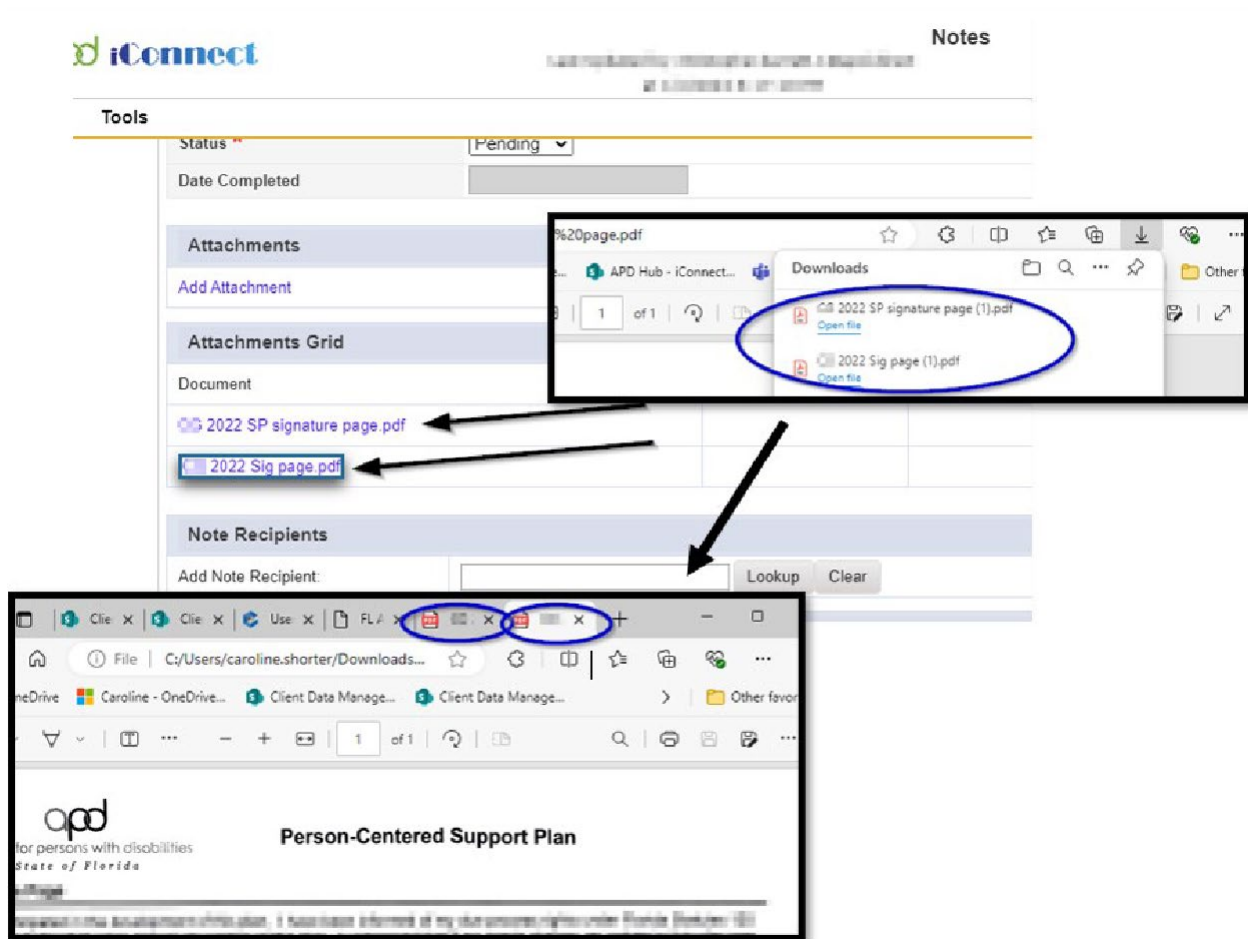
December 1, 2024

### Opening Multiple Attachments That Are Within the Notes Tab

When there is a need to review all the attachments within one Note, are users required to open each attachment then close that attachment to then open another?

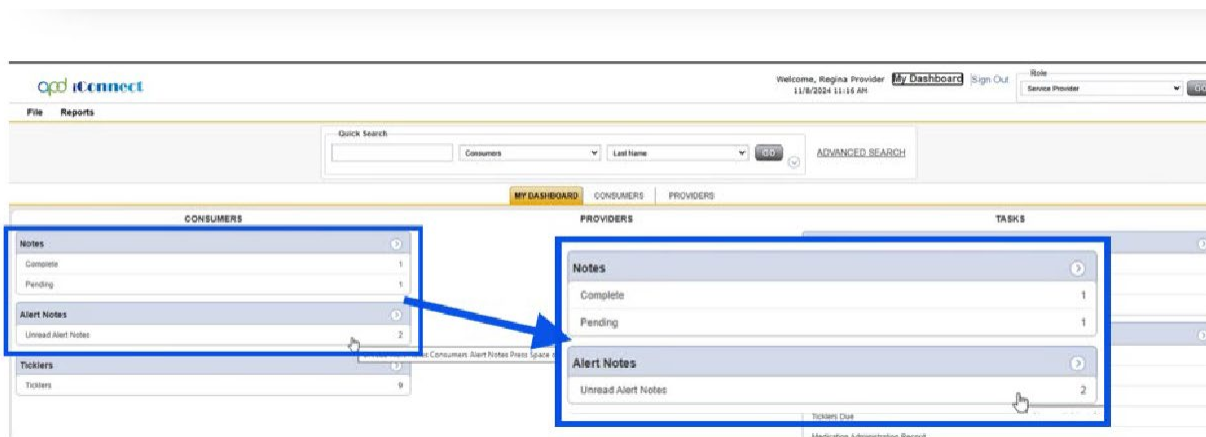
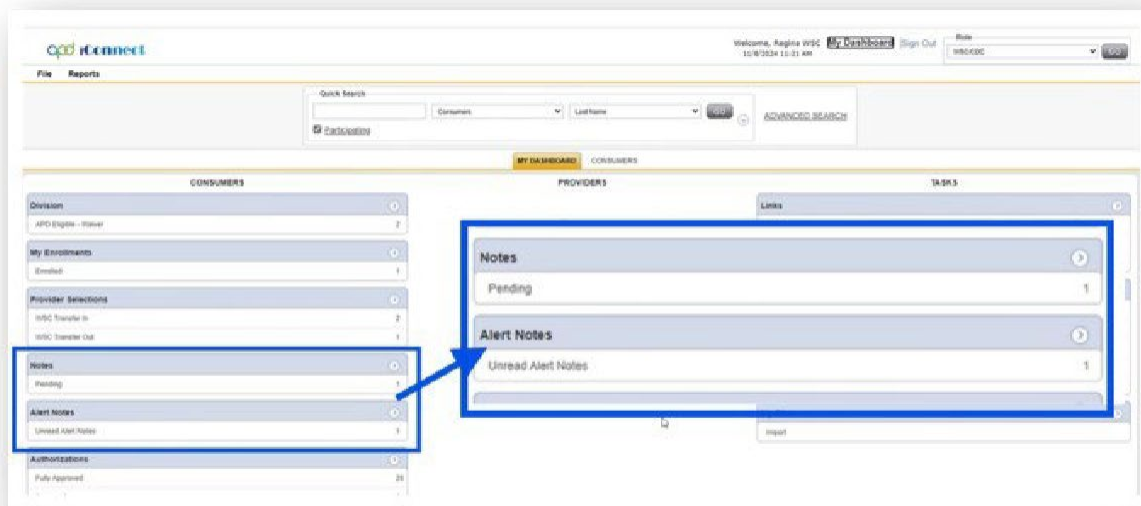
No, when the user clicks on one attachment, the file will download onto their device, so the user can open multiple files at one time by downloading all the files and opening them from the device. This allows for multiple documents to remain open at the same

time until the user closes them.



### Where do we find Alert Notes?

Alert Notes are important Notes to inform the providers of a significant change regarding their client. Based upon user feedback, the Alert Note pane within the Consumer column is now below the Note pane, so all Note types are in close proximity to each other in order to save users time and prevent confusion when reviewing for unread Notes.

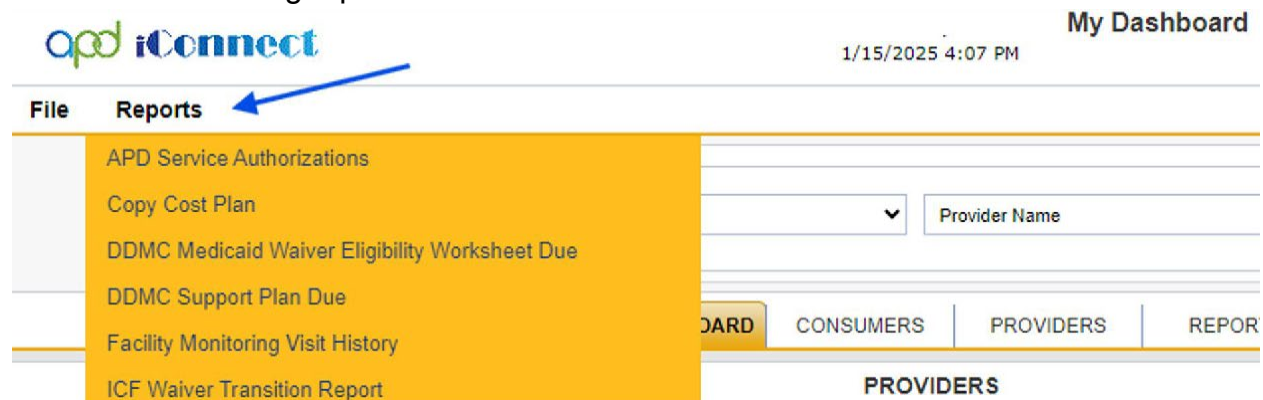


**February 1, 2025**

## **Where do I find reports in iConnect?**

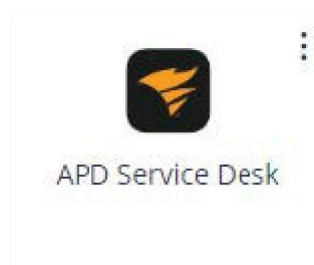
Reports are found in different screens within iConnect depending on their usage and workflow. Locate the Reports menu dropdown on the screen to see what reports are available for you to use. Remember to refer to the job aids available for detailed

instructions on using reports.



### How do I create a service desk ticket through CyberArk?

1. Sign into the user portal (aka CyberArk) and click on the “APD Service Desk” icon.
  - a. Click on the icon to open the application.



2. Click the “New Ticket” button located on the upper right side of the screen to open the new ticket window and fill out the required fields in order to open a new helpdesk ticket.

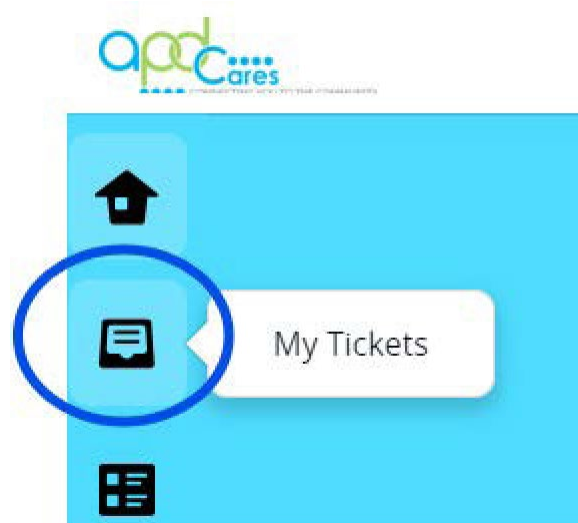


### How do I access a service desk ticket already created?

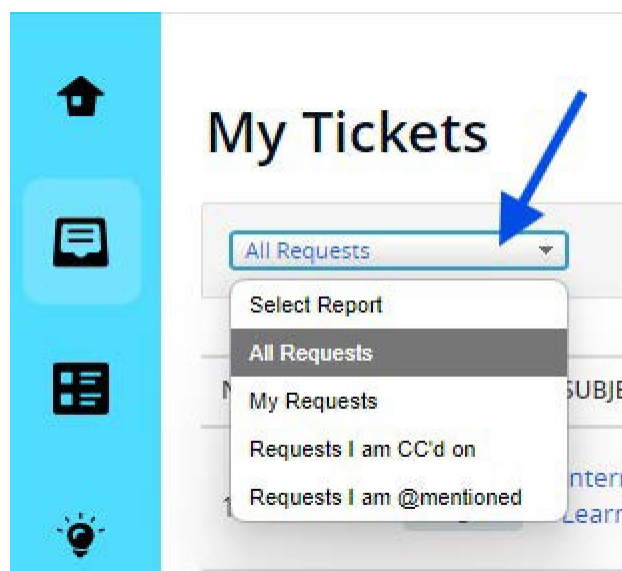
1. Sign into the user portal (aka CyberArk) and click on the “APD Service Desk” icon.
  - a. Click on the icon to open the application.



2. Click the ticket icon on the left side of the screen.
  - a. If you hover over the ticket icon it will display "My Tickets."



3. A list of all tickets associated with the account will display. The list can be filtered, using the dropdown menu, to show tickets that were requested by the user or tickets where the user was copied or mentioned.



- 

**How long does it take for the preauthorization (PA) Number to show on service authorizations?**

- Service authorization information is sent outbound to FMMIS at 01:00 a.m.
- Additional information is then returned to iConnect at 05:00 a.m.

Example of an authorization in “Ready to Send” status:

File Reports Ticklers View Consumer Incident

Diagnosis Eligibility Medications **Auths** Provider Documentation Contacts Consumer Module User

Demographics Divisions Consumer Budgets Programs Provider Selections SAN Notes Forms Appointments Plans Pre-enrollment Payers

Filters

Division

13 Auths record(s) returned - now viewing 1 through 13

	Division	Provider	Auth ID	Start Date	End Date	Auth Service EDI Status	Max Units	Status	Rate	Amount Approved	Cancelled	Provider Rate Type	Consumer County	Service Ratio
<input checked="" type="checkbox"/>	APD	Pending Provider	232432	06/05/2019		Ready to Send								
<input checked="" type="checkbox"/>	APD		232433	06/05/2019		Ready to Send								
<input checked="" type="checkbox"/>	APD	A Test Provider	232434	05/01/2019	06/30/2019	Approved								

Auth Service EDI Status  
Ready to Send  
Ready to Send



Example from iConnect of an authorization in “Approved” status from the Auth tab, within the list view grid, after opening the authorization, and opening the AuthService tab:

The top screenshot displays a list view grid for Authorizations. The grid includes columns for Division, Provider, Auth ID, Start Date, End Date, Status, and Cancelled. A row for 'A Test Provider' is highlighted, showing an 'Approved' status. A yellow box labeled 'Approved' points to the status column of this row. The bottom-left screenshot shows the 'Authorization' form with fields for Start Date, End Date, Division, Provider, Date Authorized, Auth ID, Status (set to 'Fully Approved'), and Requested By. A yellow box labeled 'Fully Approved' points to the Status field. The bottom-right screenshot shows the 'AuthService' form with fields for Authorized Service, PA Number, Start Date, End Date, Index/Sub-Object, Service Code, Secondary Code, Service Description, Unit Type, Units Per, Units of Measure, Max. Units, Rate, Amount Approved, Auth Service EDI Status (set to 'Approved'), Status, and Worker. A yellow box labeled 'Approved' points to the Auth Service EDI Status field.

**April 1, 2025**

## How are the list view grids used in iConnect?

All tabs within the Consumer or Provider Records within iConnect will contain a list view grid to show all the items saved within the tab. Clicking on the heading of a column sorts the list in ascending or descending order. The text box at the bottom of the screen allows users to adjust the number of records displayed in the list view grid that they would like to have populated.

File

Quick Search

apr Consumers Last Name GO ADVANCED SEARCH

☐ Participating

MY DASHBOARD CONSUMERS

10 Consumers Quick Search Result record(s) returned - now viewing 1 through 10

	iConnect ID	Last Name ▲	First Name	Status	Region	
+	215544	AprilSC_1	Jeanine	Active	SUNCOAST	▼
+	215556	AprilSC_10	Joan	Active	SUNCOAST	▼
+	215547	AprilSC_2	Laura	Active	SUNCOAST	▼
+	215548	AprilSC_3	Nadene	Active	SUNCOAST	▼
+	215549	AprilSC_4	Daniela	Active	SUNCOAST	▼
+	215550	AprilSC_5	Rehana	Active	SUNCOAST	▼
+	215552	AprilSC_6	Stephanie	Active	SUNCOAST	▼
+	215553	AprilSC_7	Gloria	Active	SUNCOAST	▼
+	215554	AprilSC_8	Taushia	Active	SUNCOAST	▼
+	215555	AprilSC_9	Shannon	Active	SUNCOAST	▼

First Previous Records per page 15 Next Last

## Can iConnect users print the list view grids?

Yes, printing is available using the Menu File > Print option, only after clicking on a heading.

opd iConnect

File

Print

FL Training (copy of IT1) - Work - Microsoft Edge

https://hssflapdstage.wellsky.com/training-humanservices/Pages/PrintView.aspx

Print

Total: 1 sheet of paper

Printer

Copies

1

Layout

☐ Portrait

☐ Landscape

Pages

☐ All

Print Cancel

10 Consumers Quick Search Result record(s) returned - now viewing 1 through 10

	iConnect ID	Last Name ▲	First Name	Status	Region	
+	215544	AprilSC_1	Jeanine	Active	SUNCOAST	▼
+	215556	AprilSC_10	Joan	Active	SUNCOAST	▼
+	215547	AprilSC_2	Laura	Active	SUNCOAST	▼
+	215548	AprilSC_3	Nadene	Active	SUNCOAST	▼
+	215549	AprilSC_4	Daniela	Active	SUNCOAST	▼
+	215550	AprilSC_5	Rehana	Active	SUNCOAST	▼
+	215552	AprilSC_6	Stephanie	Active	SUNCOAST	▼
+	215553	AprilSC_7	Gloria	Active	SUNCOAST	▼
+	215554	AprilSC_8	Taushia	Active	SUNCOAST	▼
+	215555	AprilSC_9	Shannon	Active	SUNCOAST	▼

Records per page 15

215555 AprilSC\_9 Shannon