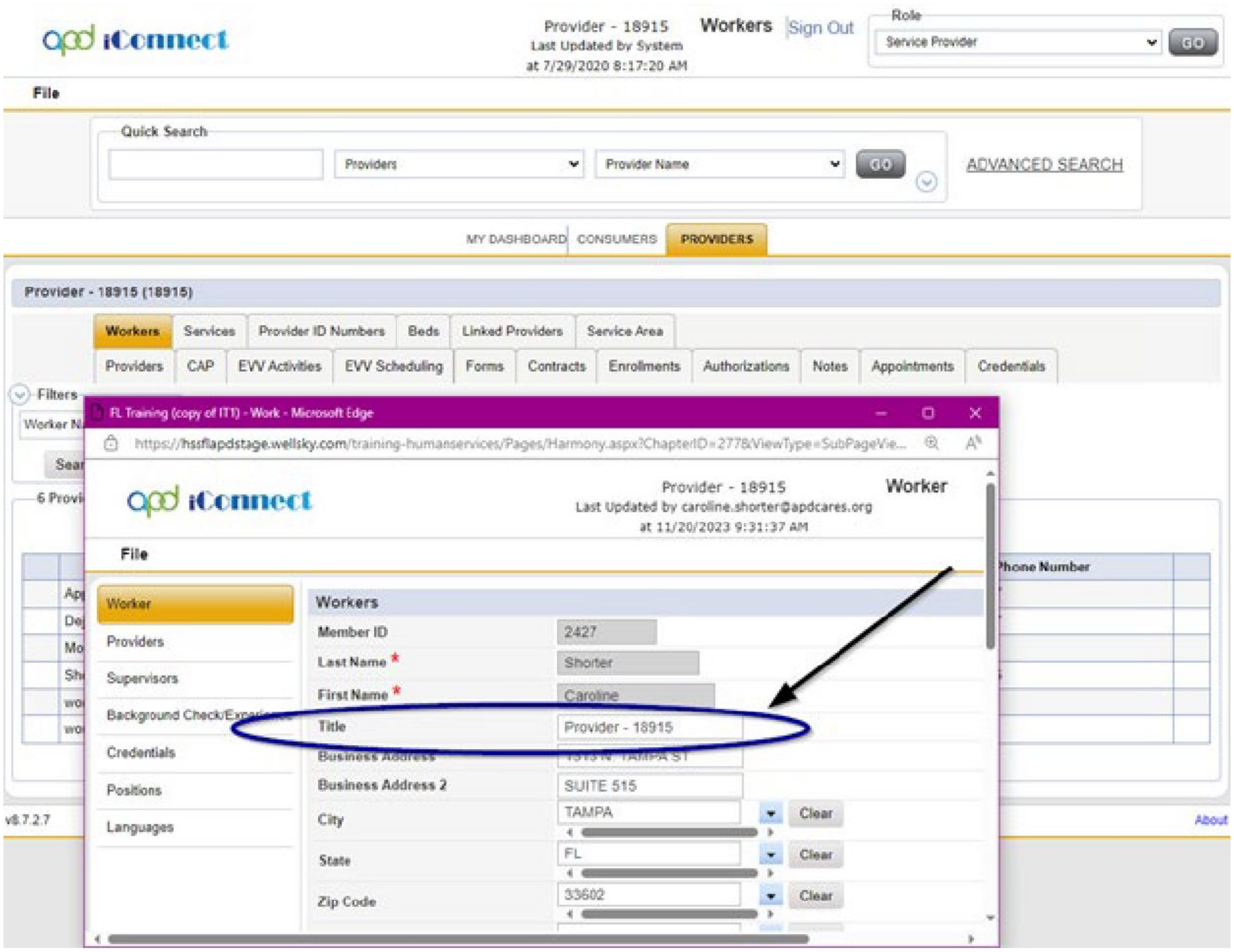
May 1, 2024

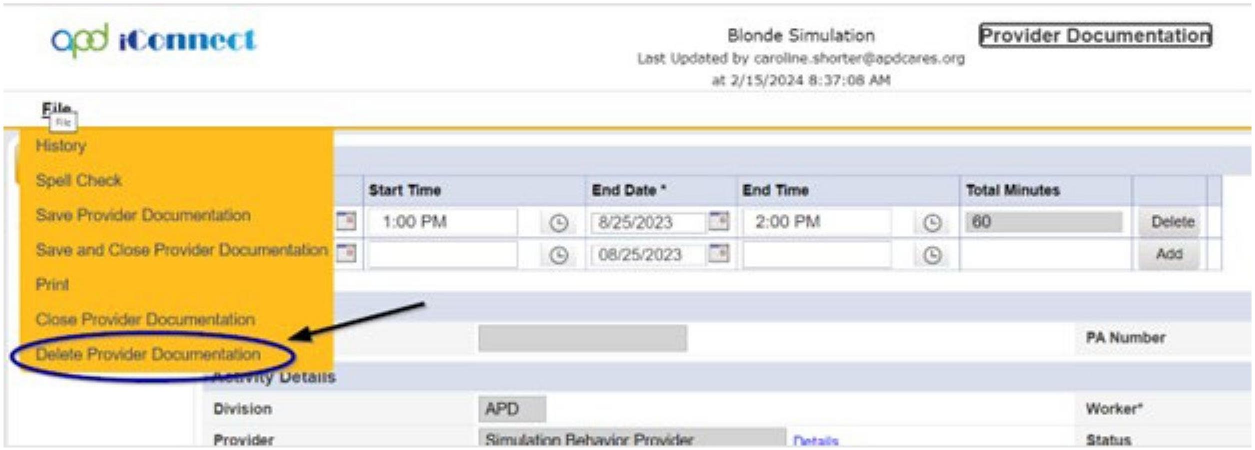
Identifying Multiple Workers with the Same Name

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.

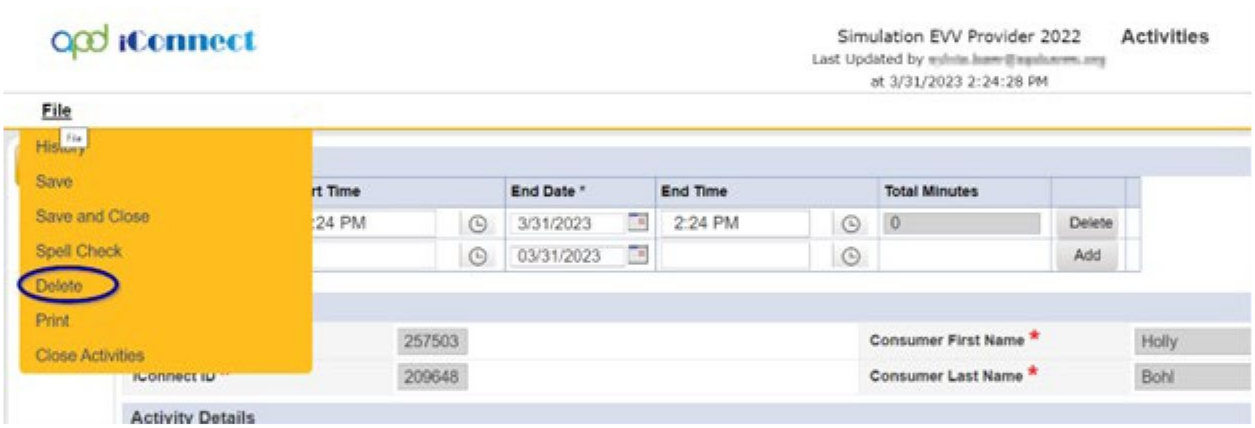


Missing EVV Activities/Provider Documentation Activities

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.

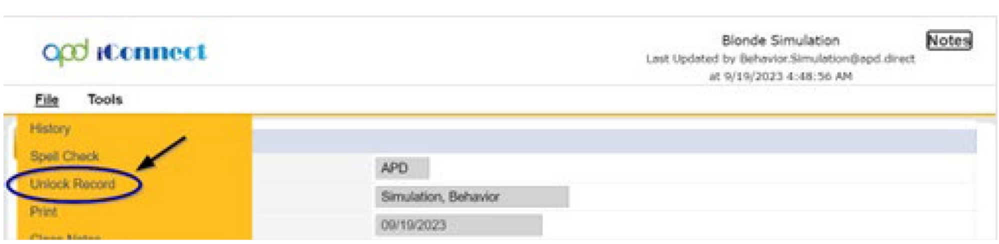


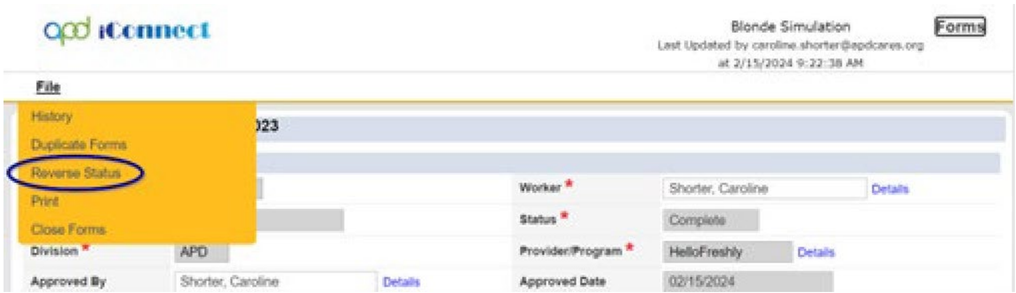
Have you identified missing EVV Activities? The Provider EVV Manager Role has the necessary permissions to delete existing EVV records. As an agency owner, if you feel that these permissions are unnecessary for your staff, manage their user accounts and remove the Provider EVV Manager role from their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

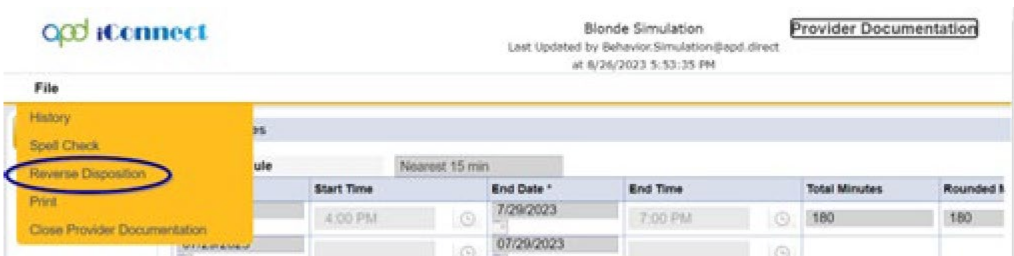


Need to Update a Record in Complete Status?

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.

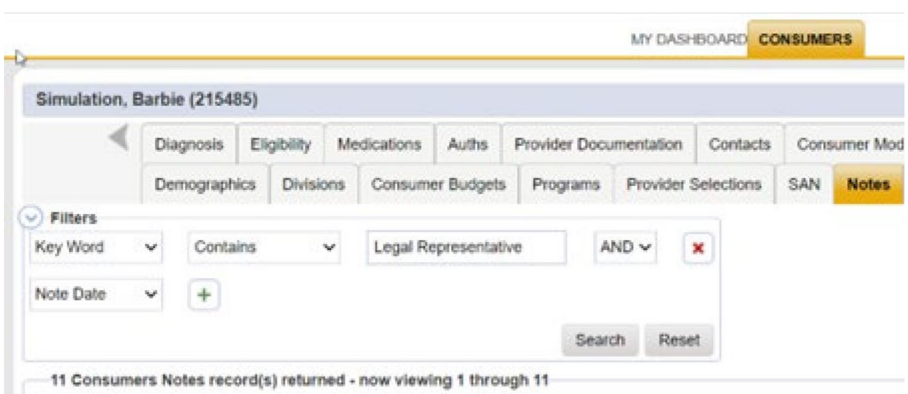


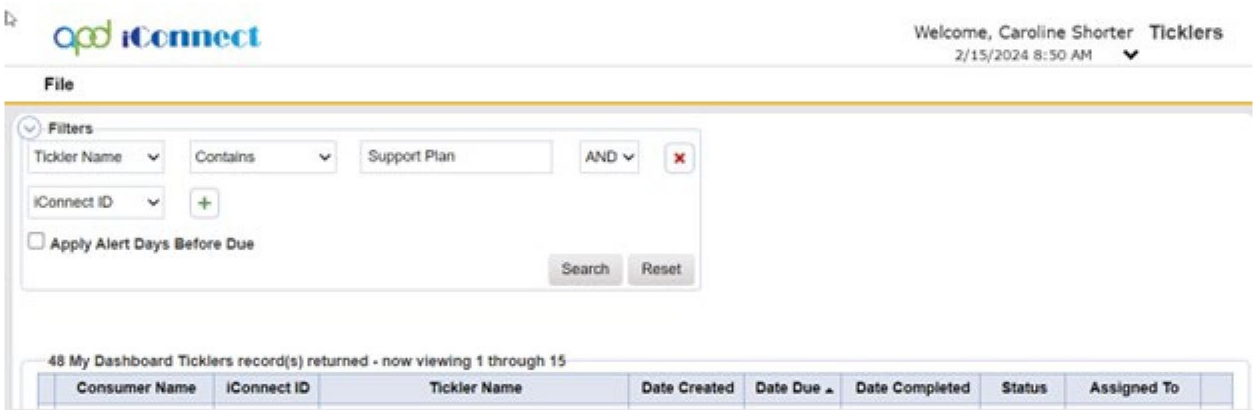




Using Filters

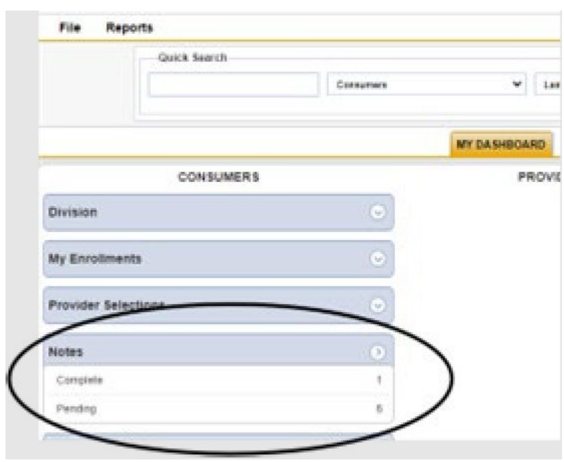
Have you been using iConnect for some time and are having challenges in locating specific records? Use the Filter Options available within most tabs/pages in iConnect. If performing a word search, update the criteria to “Contains” and type the word that is being searched…. Or type the first three letters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

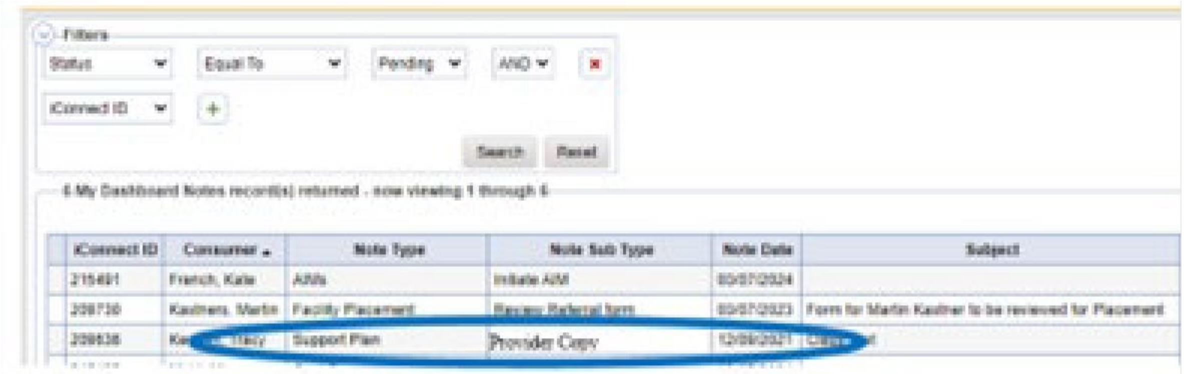


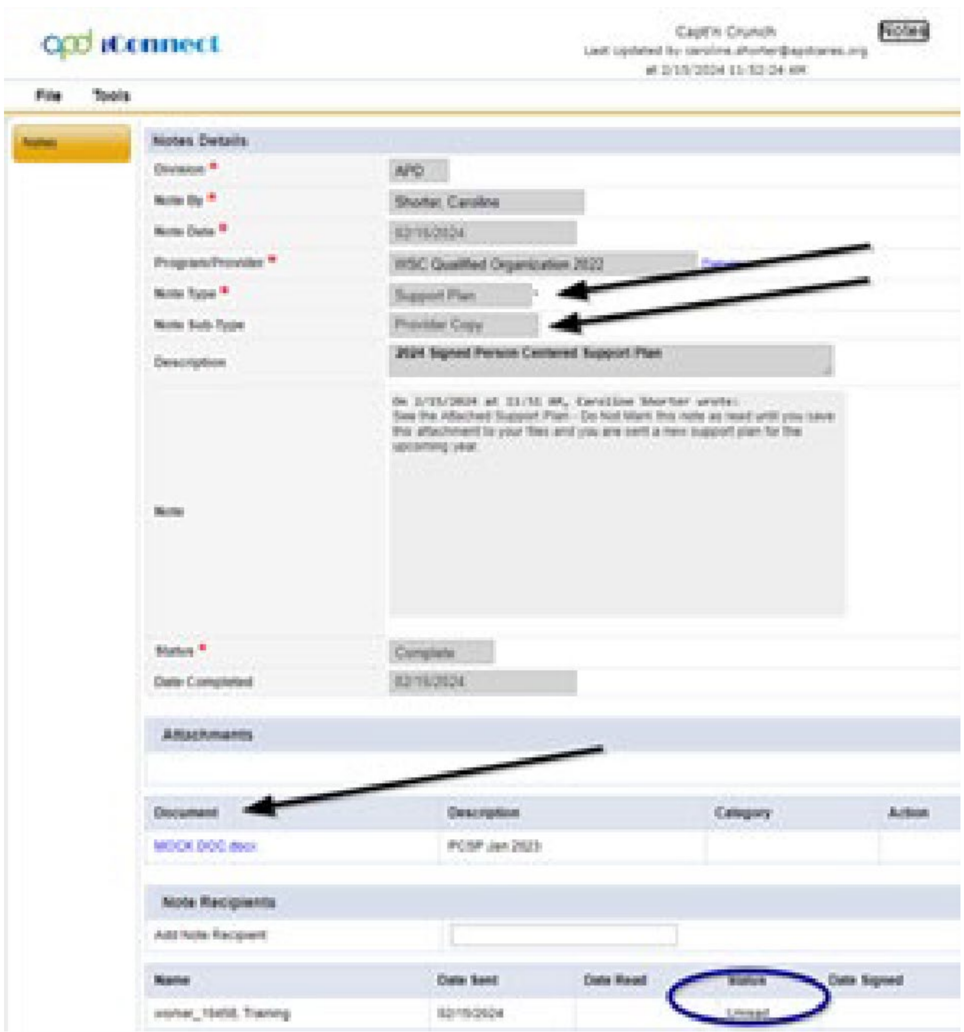


Identifying where the Support Plan is from the Waiver Support Coordinator (WSC)

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.

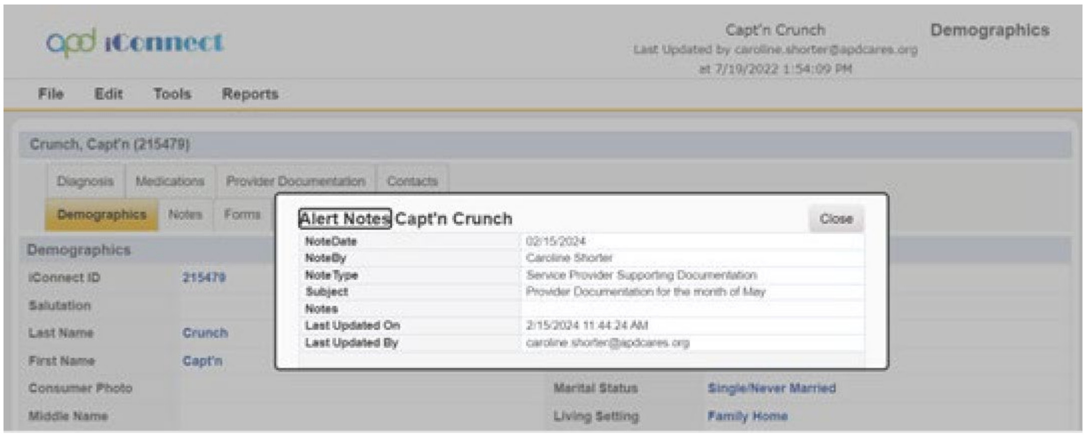


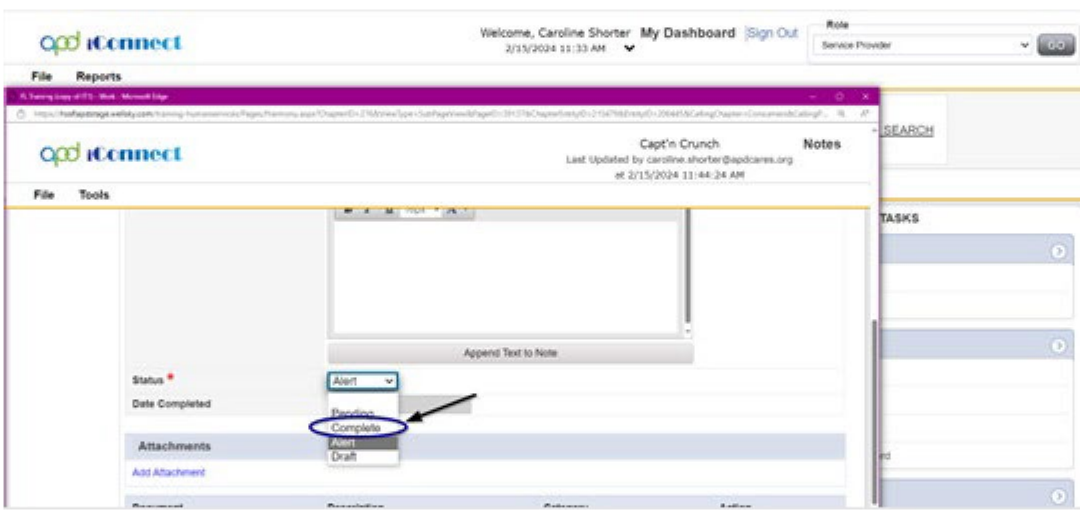




Why Do Alert Notes Appear When a Consumer Record is Opened?

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.

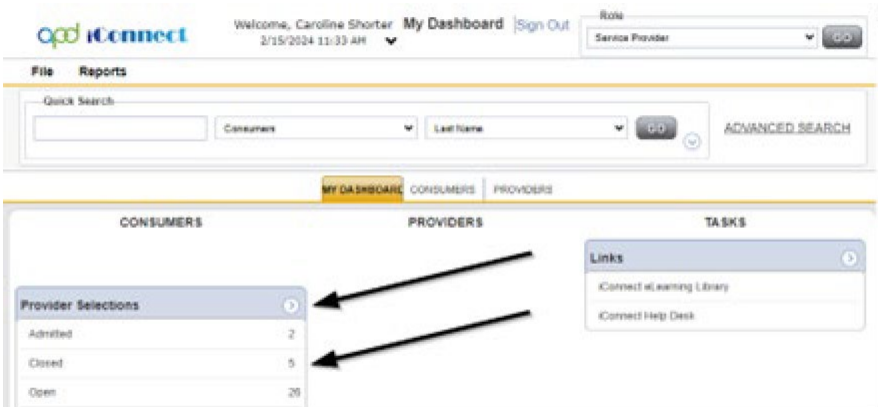


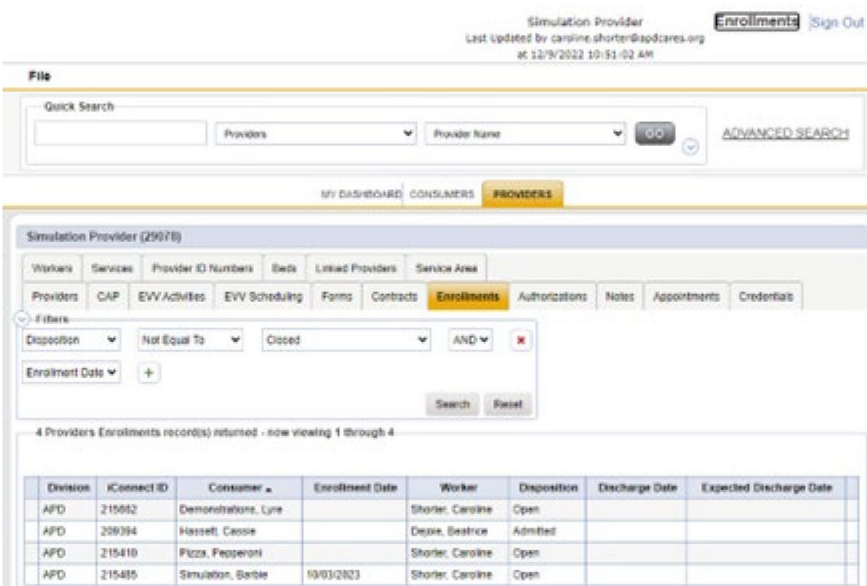


June 1, 2024

Need to Know There Is A Provider Selection for Your Organization

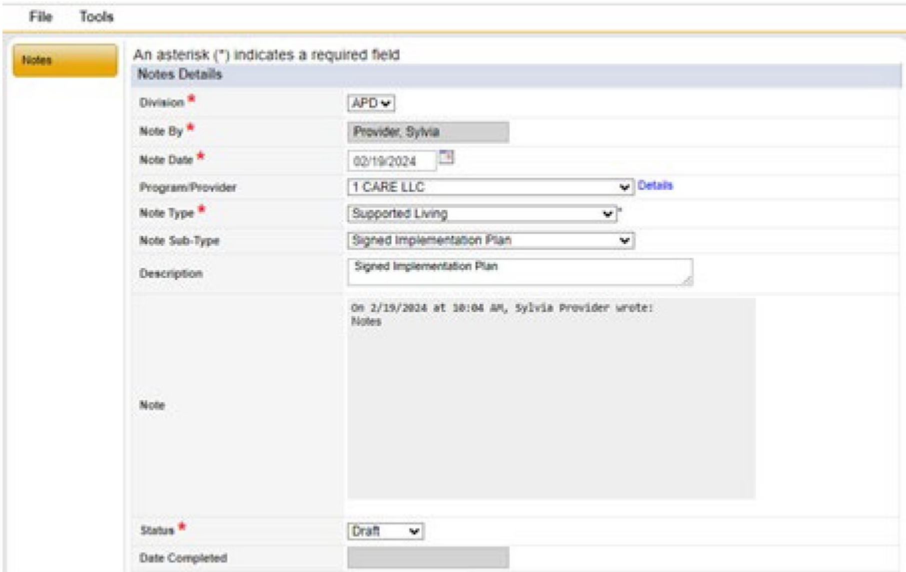
Have you contacted the Waiver Support Coordinator and are eagerly waiting for the provider selection record to be added to the consumer's record? Once the provider selection record is created, you will see the record from My Dashboard as a "Provider Selection" and from the Provider Chapter within the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

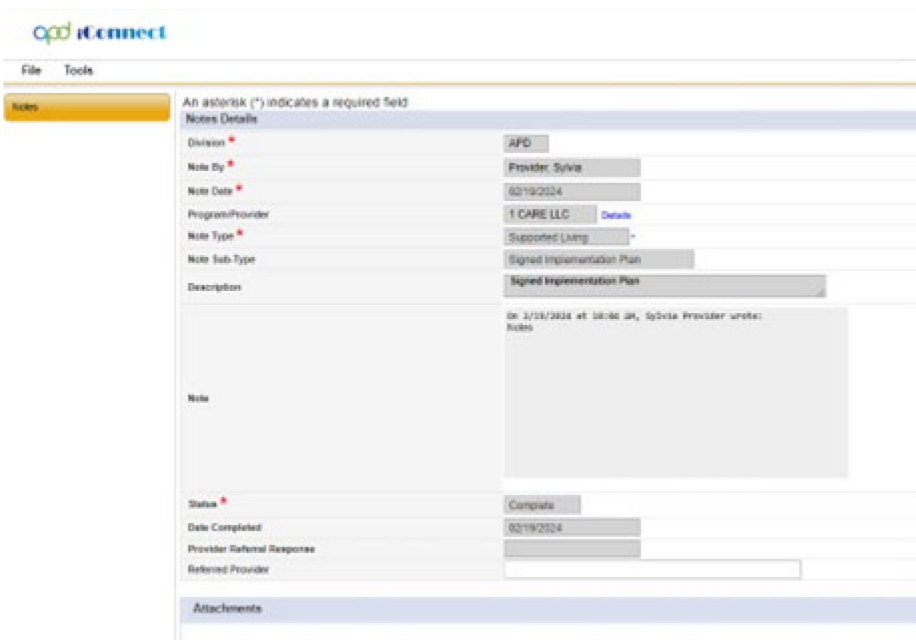




How Can I Change a Note in iConnect That Is Grayed Out?

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.





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 listed 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.**

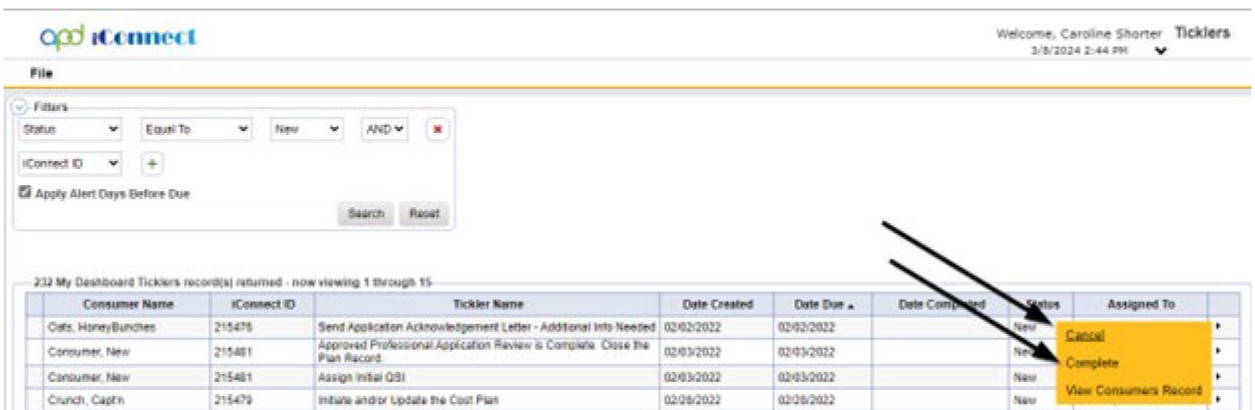

Note Recipients

Add Note Recipient: ... Clear

Name	Date Sent	Date Read	Status	Date Signed	
Appleton, Susan	02/19/2024		Unread		Remove
Baer, Sylvia	08/30/2022	02/19/2024	Read		
Baer, Sylvia	2/19/2024		Unread		Remove

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.



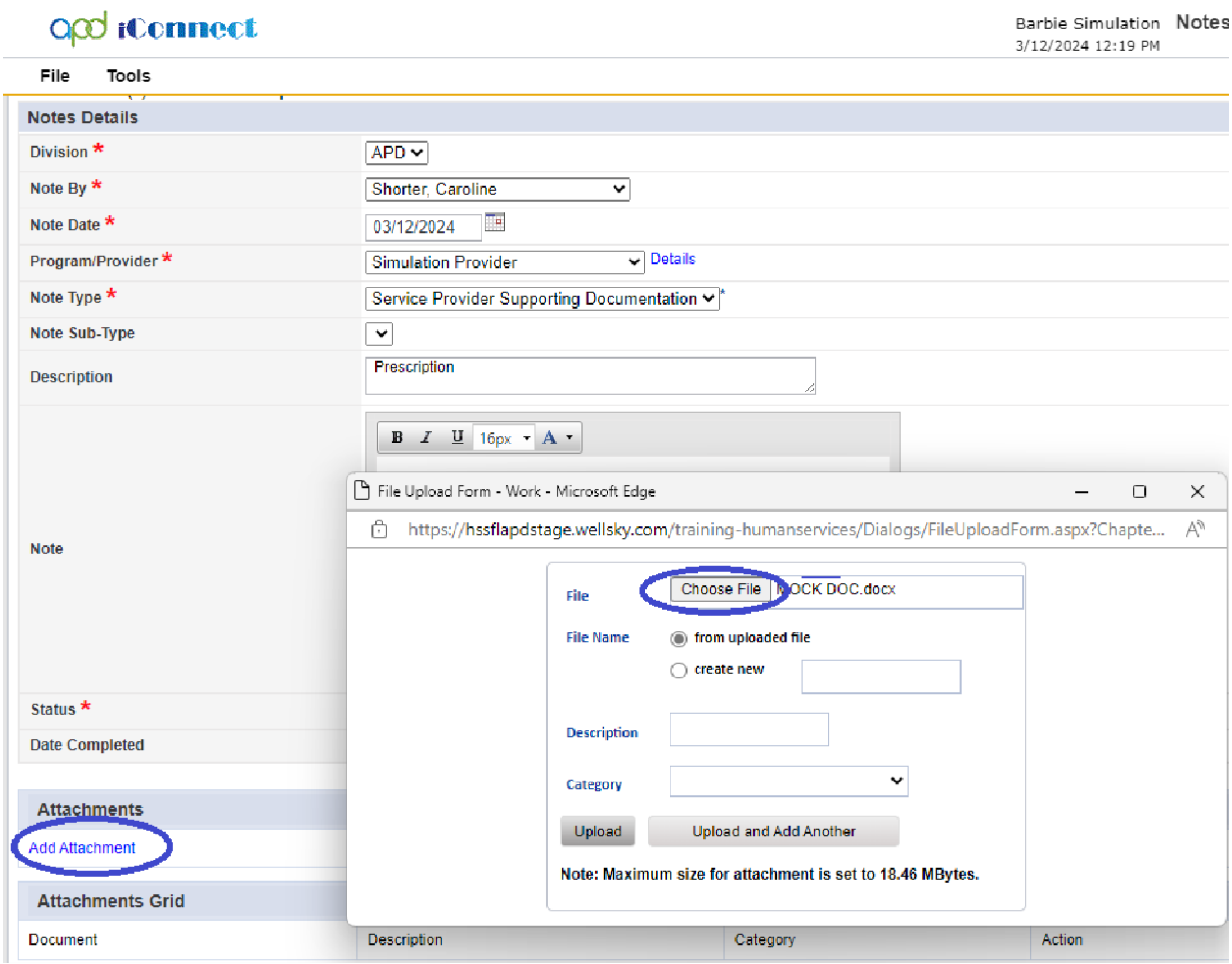
Need A Transcript of TRAIN Course Modules in Writing

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.

July 1, 2024

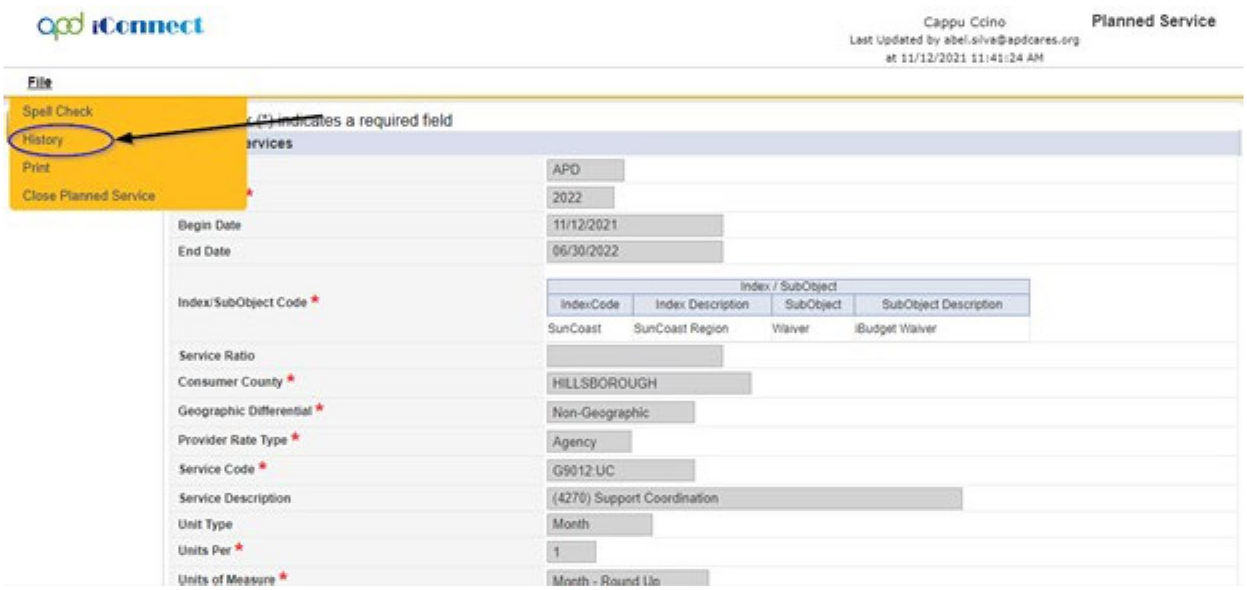
Attaching Documents From Outside of iConnect

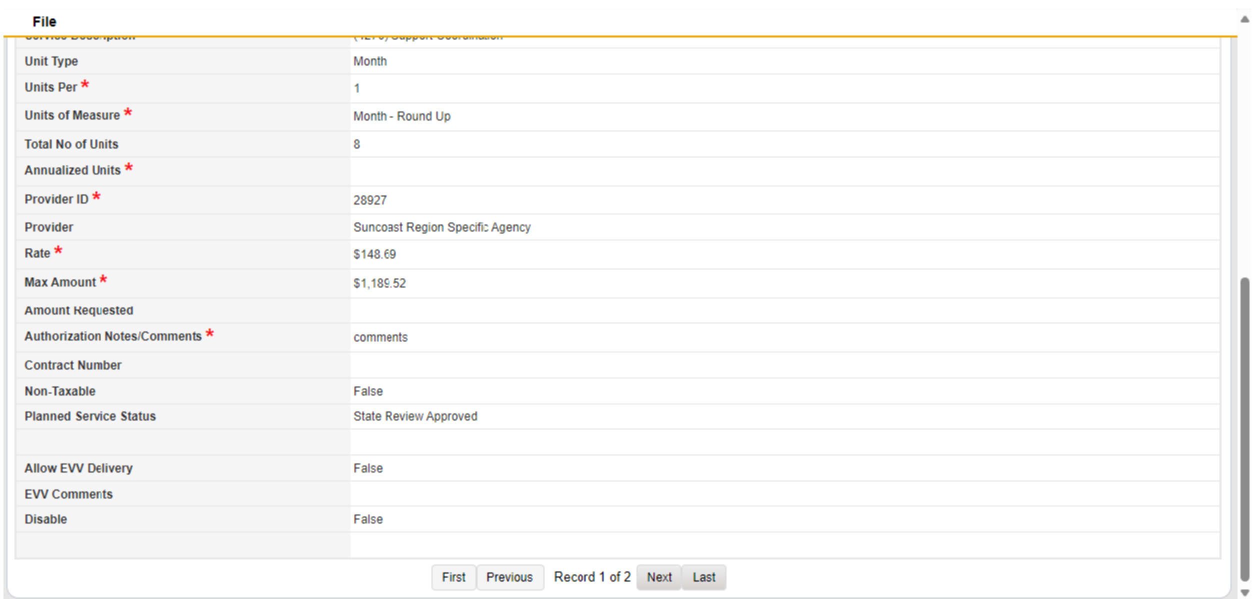
Do you have additional information that you need to include in the Consumer or Provider record? Use the Note tab in either record to add a new note. Complete the required fields in accordance to the workflow you are following. Use the Add Attachment link to open the File Upload Form window. Click “Choose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



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.

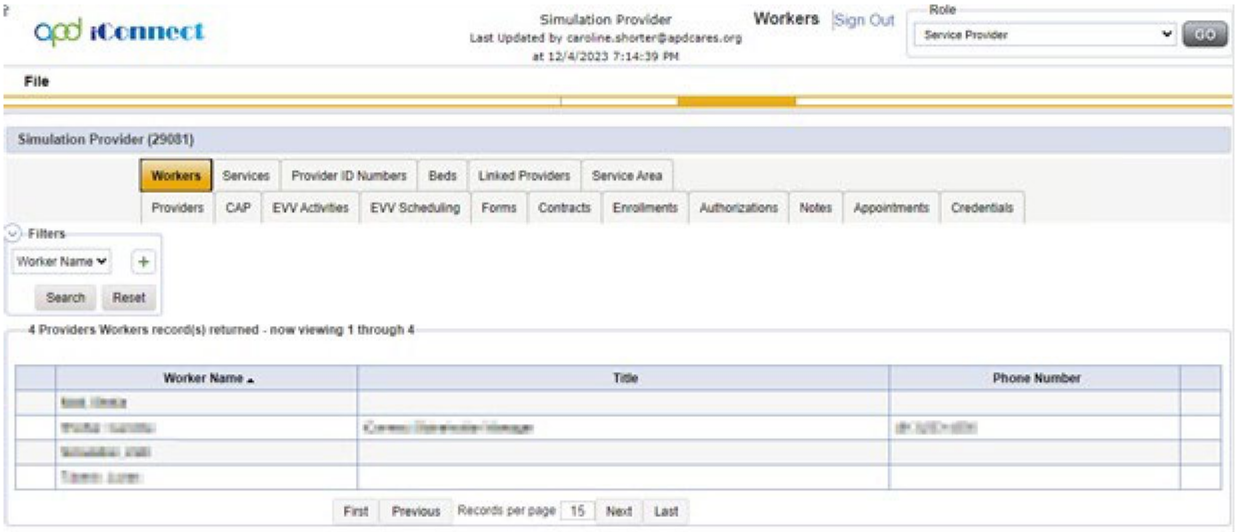


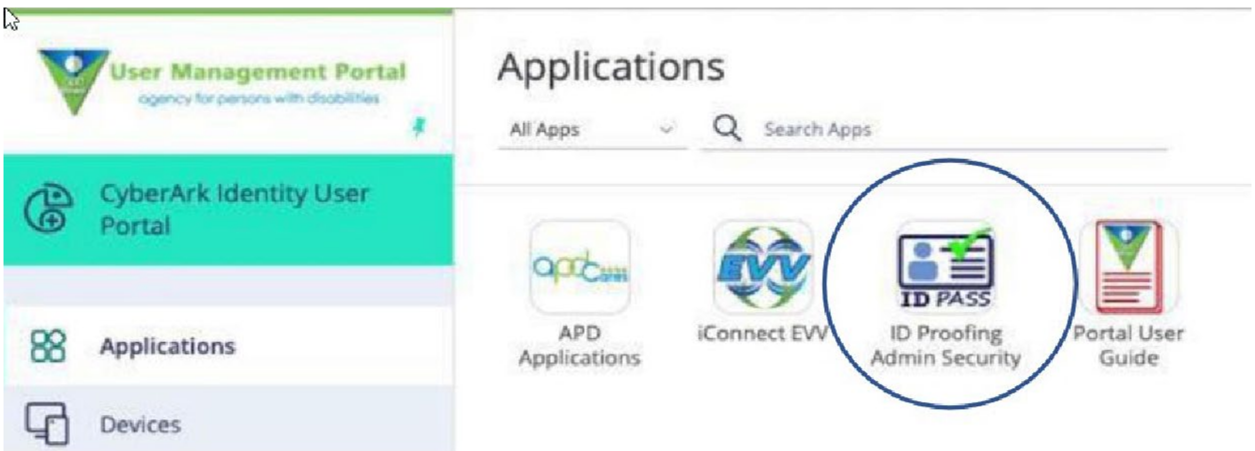


Unable to See Workers in iConnect

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

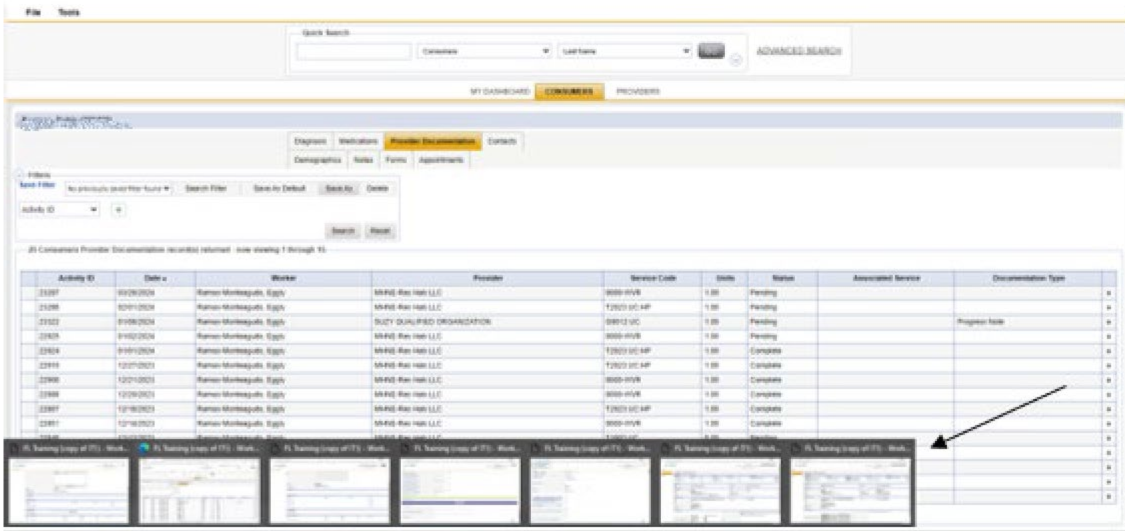
Security to grant this employee access through your organization.

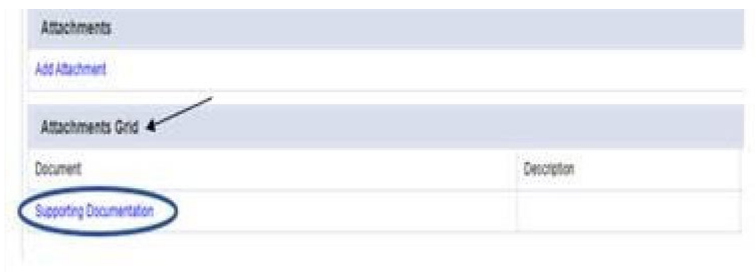


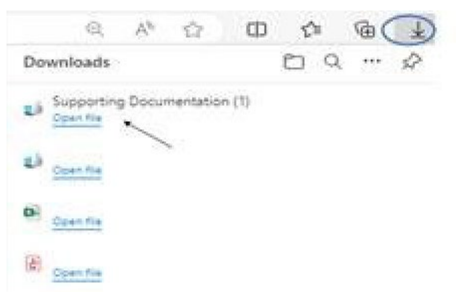


Time-Out Feature in iConnect

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.



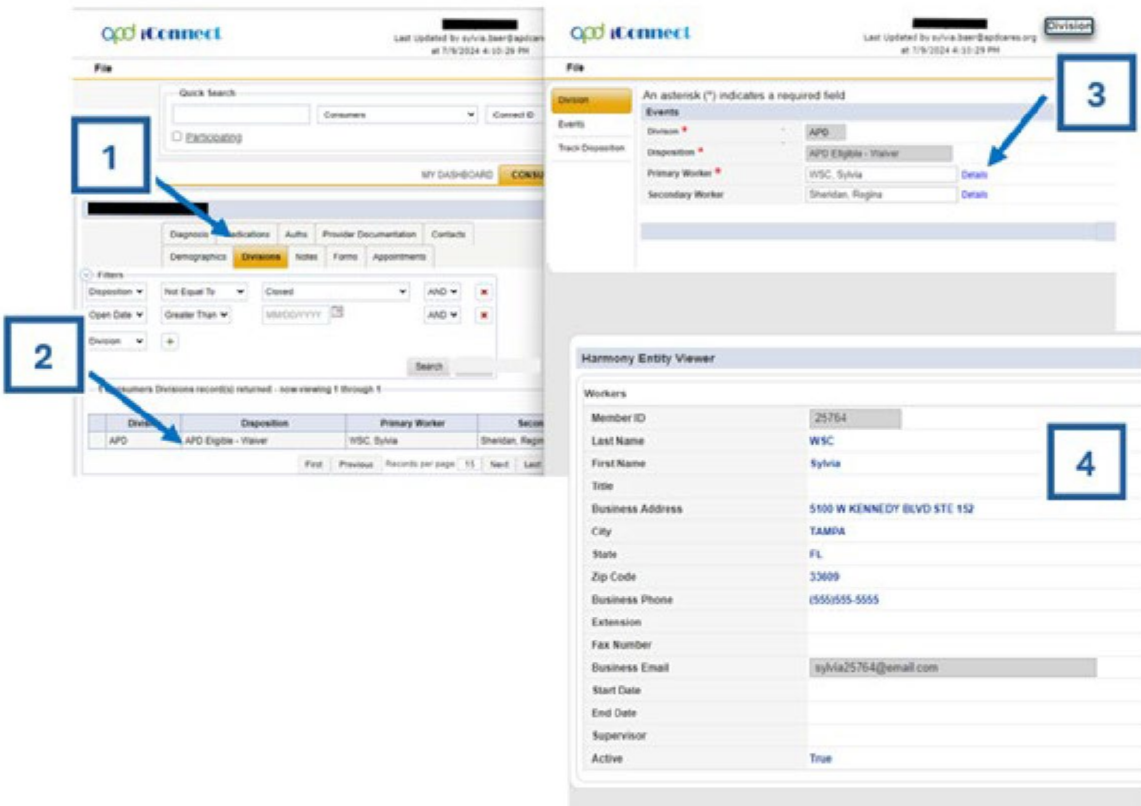




August 1, 2024

Division Tab – Locating WSC's Contact Information for Client

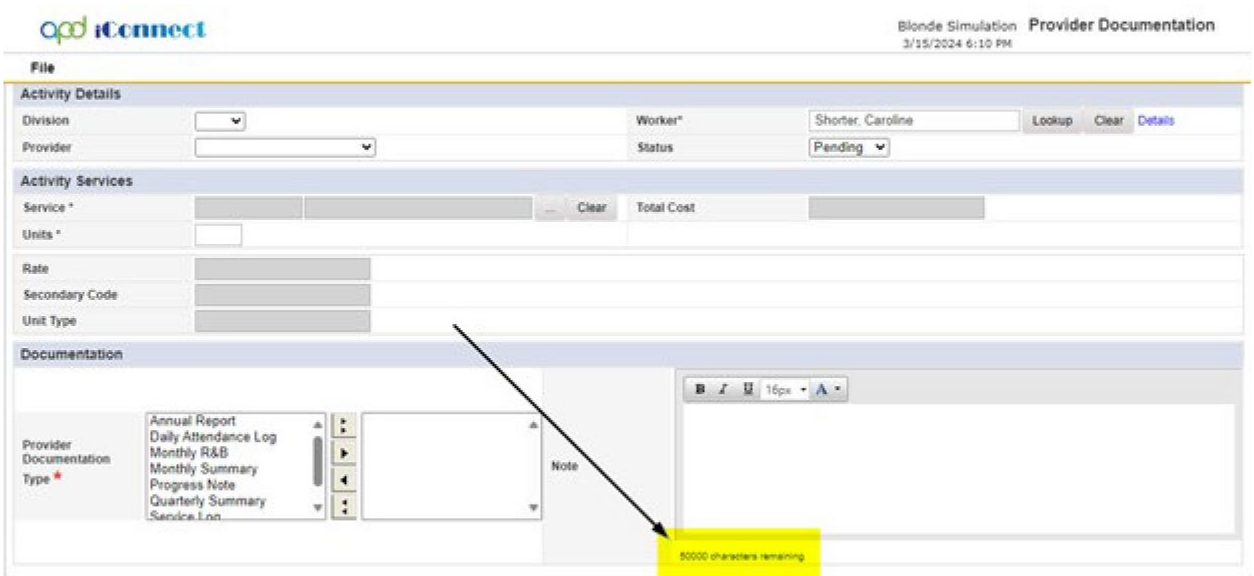
A new enhancement has been implemented in iConnect that now allows the Service Provider and Service Provider Worker roles to access the Division tab of the clients that they have authorizations for in iConnect. This will allow the Service Provider and the Service Provider Worker to find details of the 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.



Characters Available on Form Text Fields in iConnect

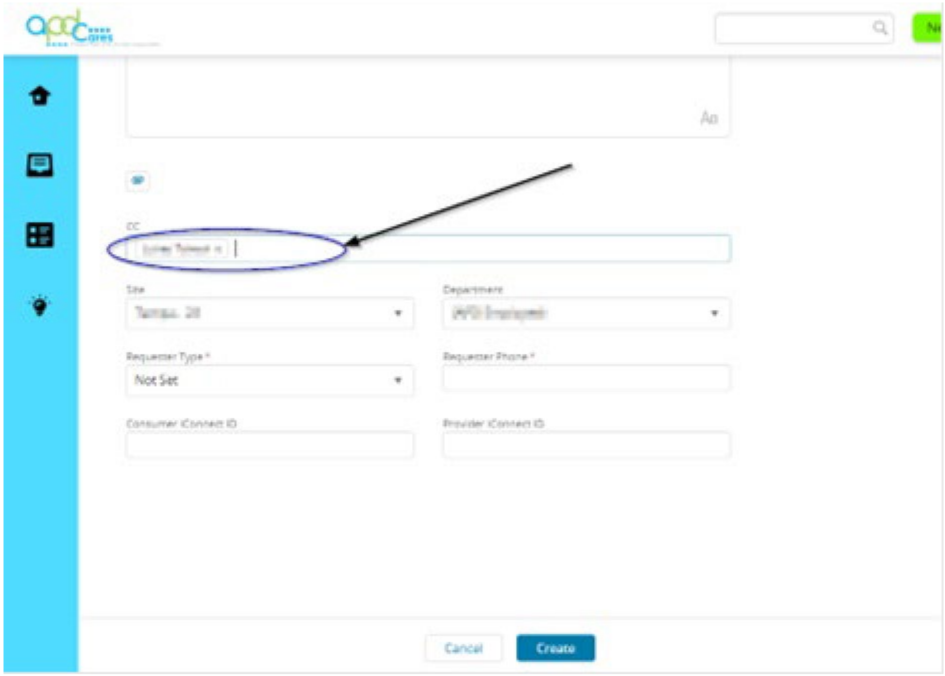
Is there a way to see the character limits within iConnect?

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.



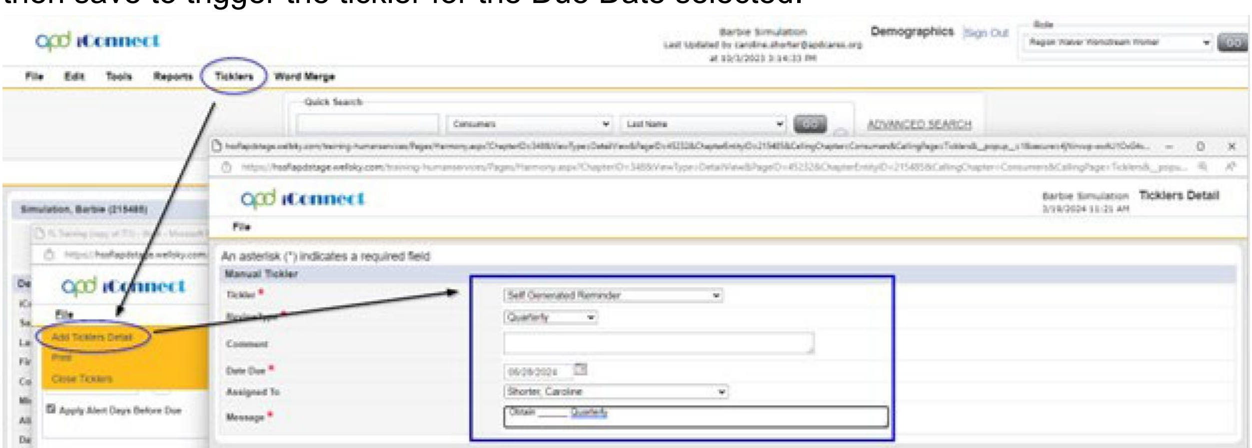
How do I access the Service Desk Ticket that my staff has submitted?

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.



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.

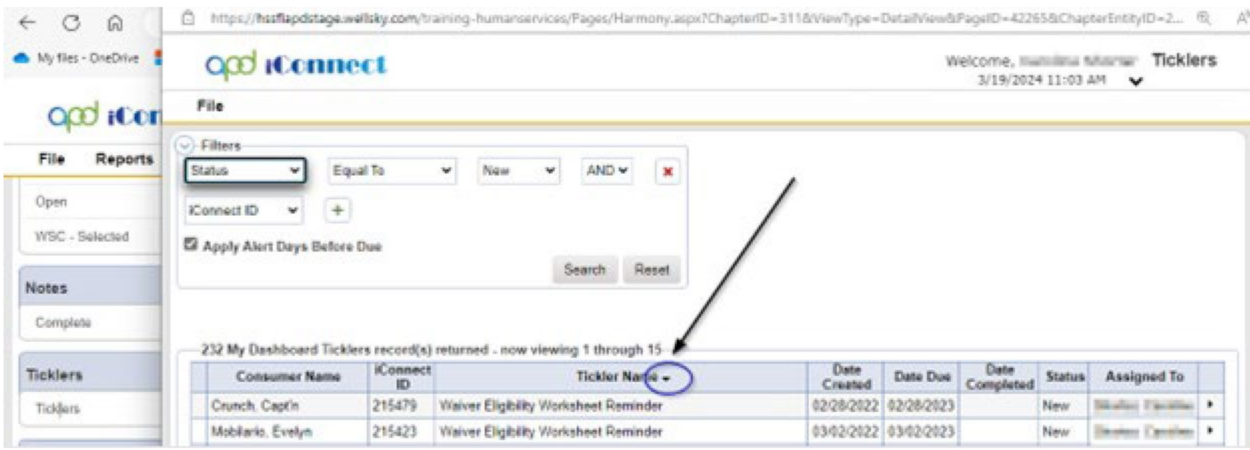


How do I sort through my Ticklers?

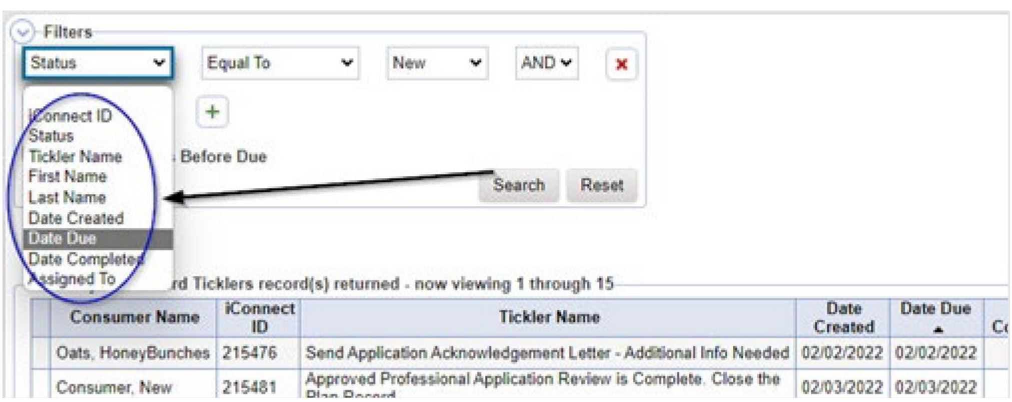
Have you allowed your tickler list view to grow and now are having a challenge in prioritization? Use the sort feature and the filters to locate and prioritize your list of ticklers. You can sort the list by clicking on one of the headings (Consumer Name, iConnect ID, Tickler Name, Date Created, Due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



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

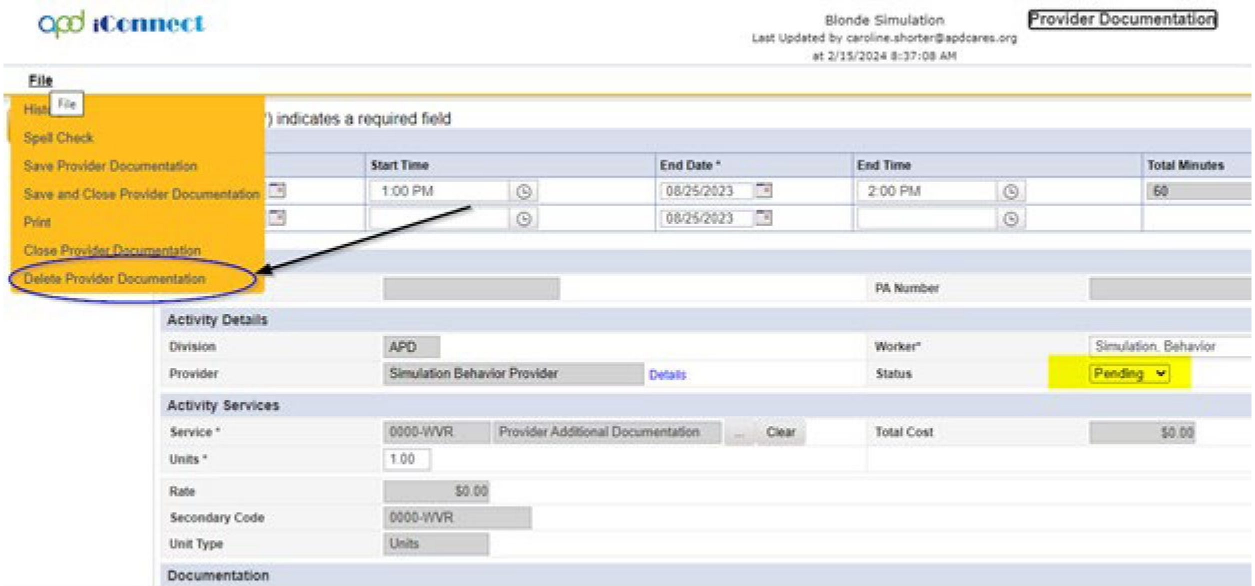


September 1, 2024

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.

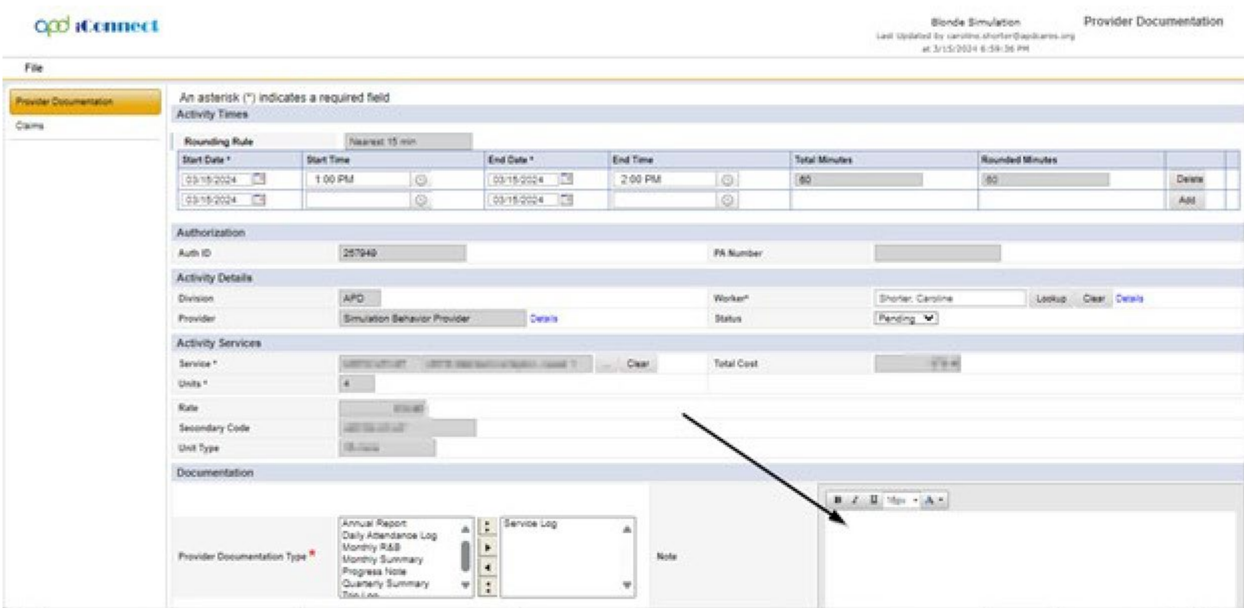


October 1, 2024

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.



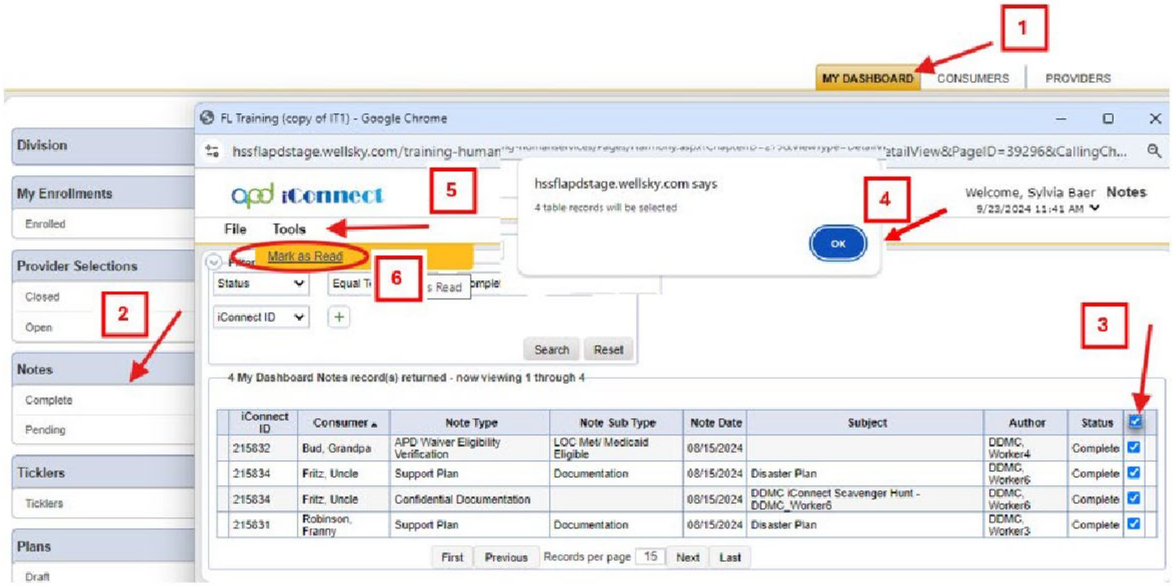
November 1, 2024

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.

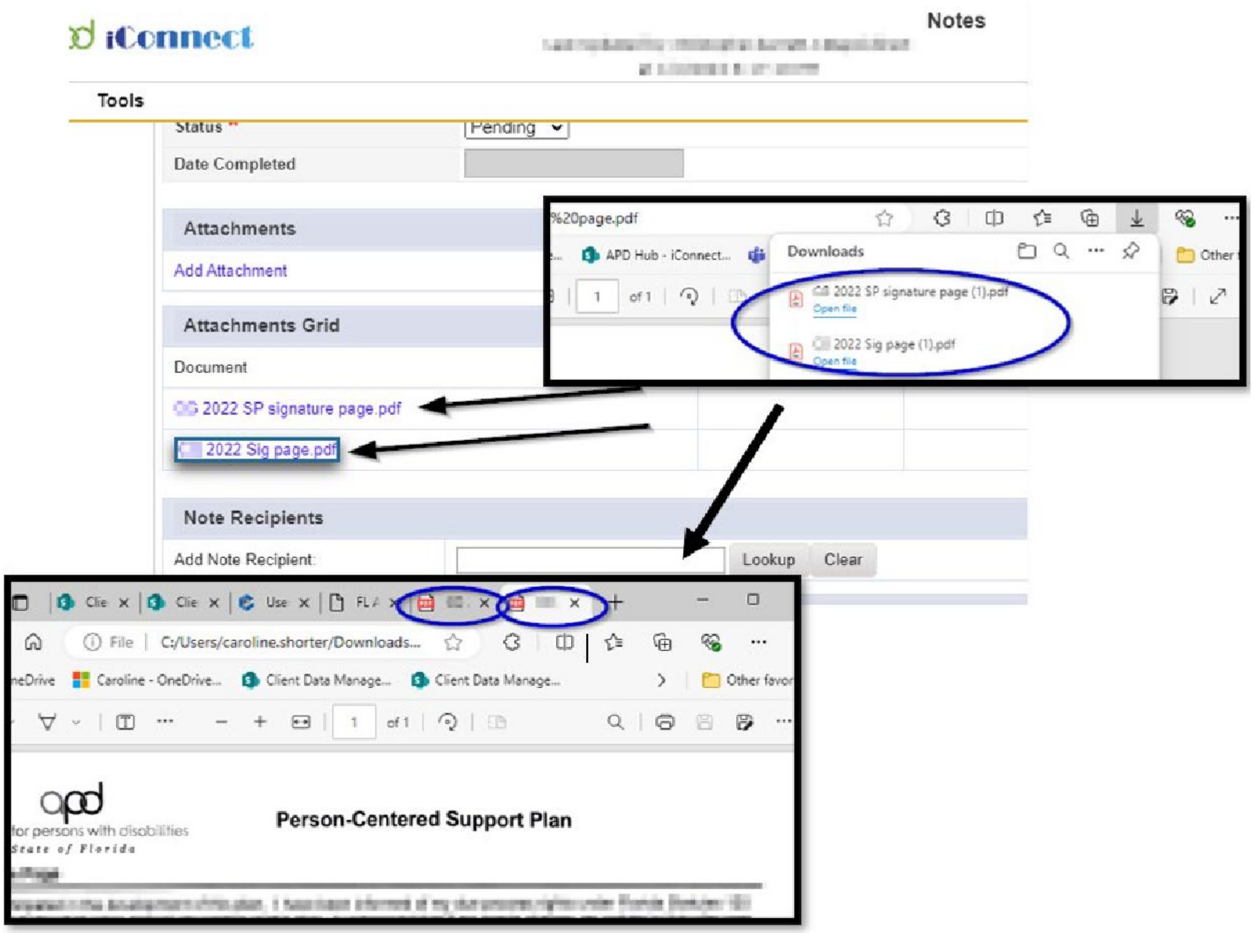


December 1, 2024

Opening Multiple Attachments That Are Within the Notes Tab

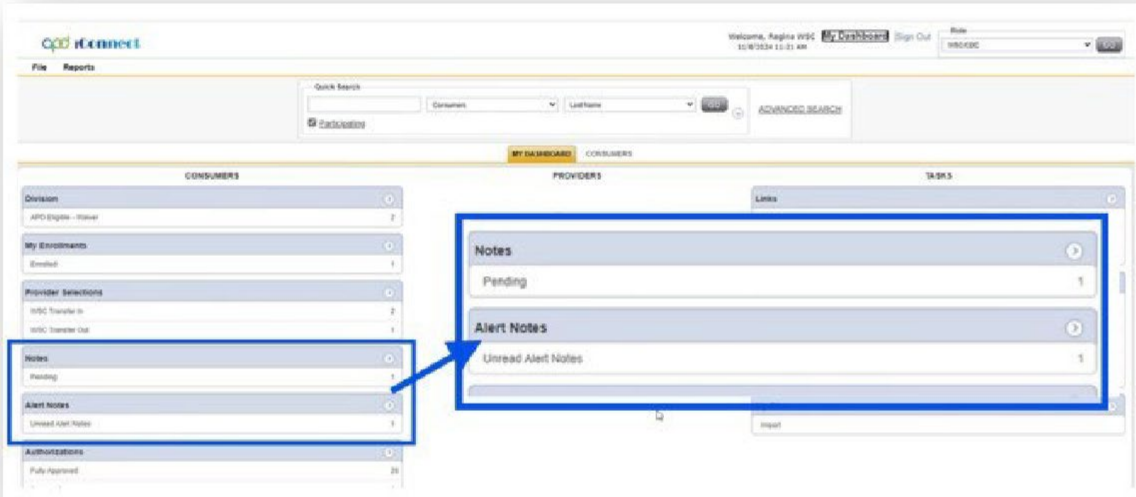
When there is a need to review all the attachments within one Note, are users required to open each attachment then close that attachment to then open another?

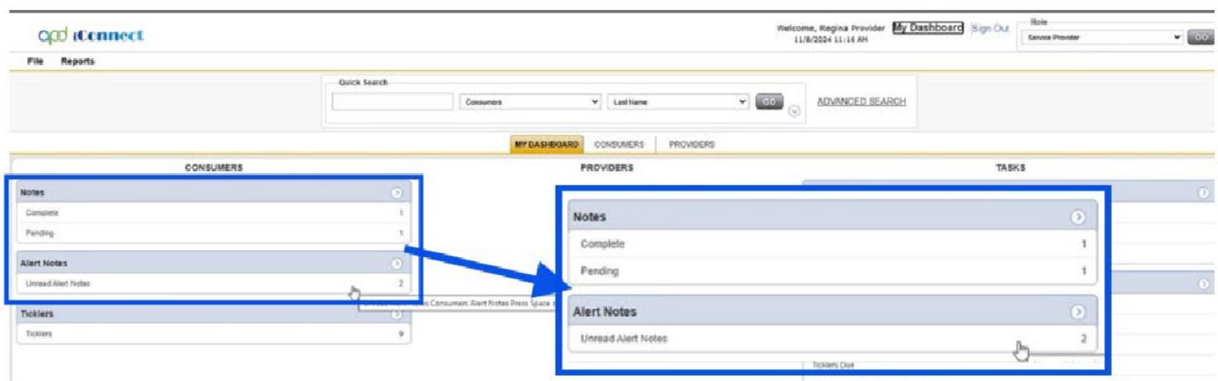
No, when the user clicks on one attachment, the file will download onto their device, so the user can open multiple files at one time by downloading all the files and opening them from the device. This allows for multiple documents to remain open at the same time until the user closes them.



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.

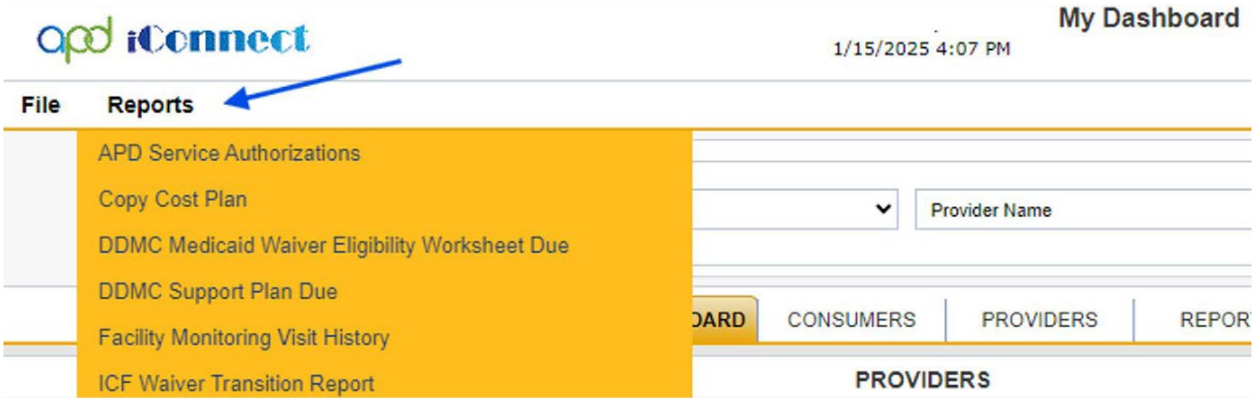




February 1, 2025

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?

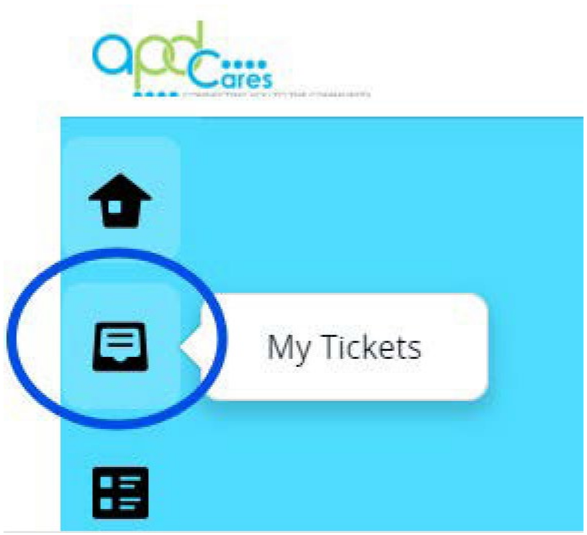
1. Sign into the user portal (aka CyberArk) and click on the “APD Service Desk” icon.
    a. Click on the icon to open the application.

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.

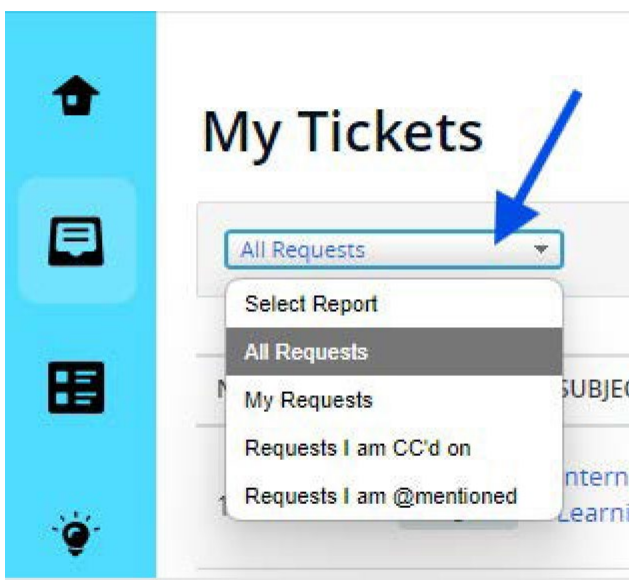
How do I access a service desk ticket already created?

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.

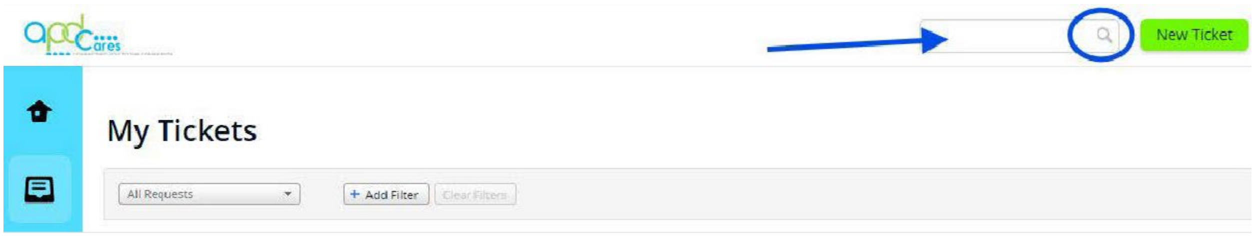
2. Click the ticket icon on the left side of the screen.
    a. If you hover over the ticket icon it will display “My Tickets.”



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.



4. Use the search engine at the top of the screen to locate a specific ticket. Search by ticket number or key words to locate a specific ticket. Click the magnifying glass to execute the search.



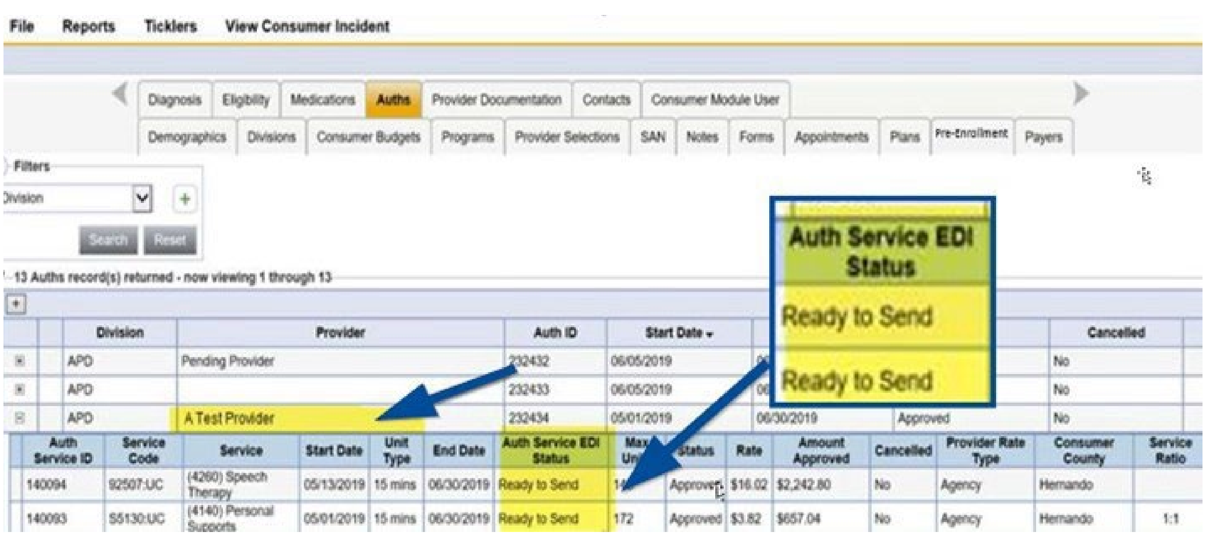
March 1, 2025

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

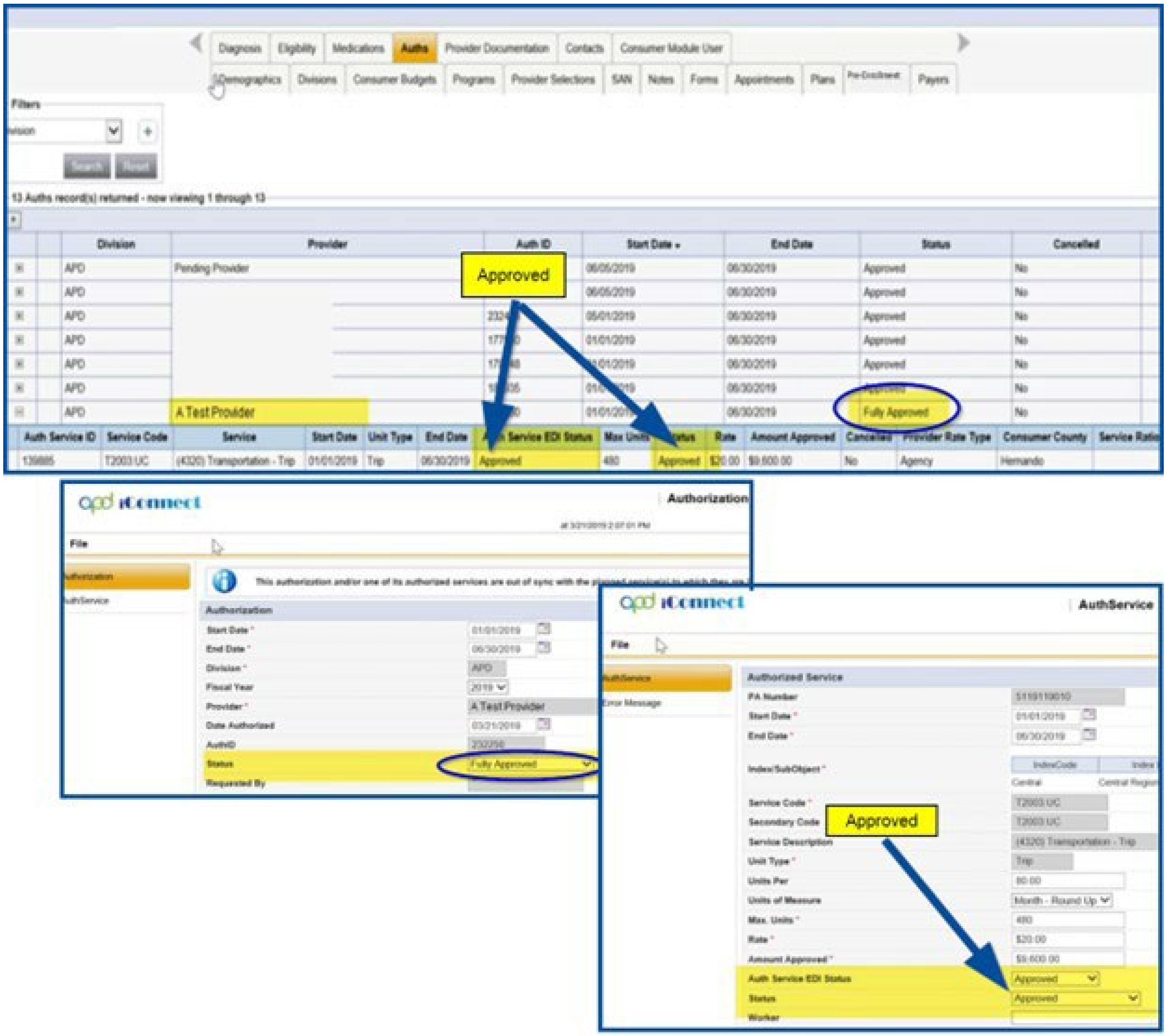
A Waiver Support Coordinator (WSC) initiates the approval process for a service authorization when the WSC creates or updates an existing service authorization in iConnect. This creates a PA number, so that services rendered may be billed. This process involves the iConnect interface with the Florida Medicaid Management Information System (FMMIS). When the WSC creates a new service authorization or updates an existing service authorization, the interface with FMMIS runs as follows:

- 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.

Once the inbound information is received, the PA number is assigned to the authorization in iConnect.
Example of an authorization in "Ready to Send" status:



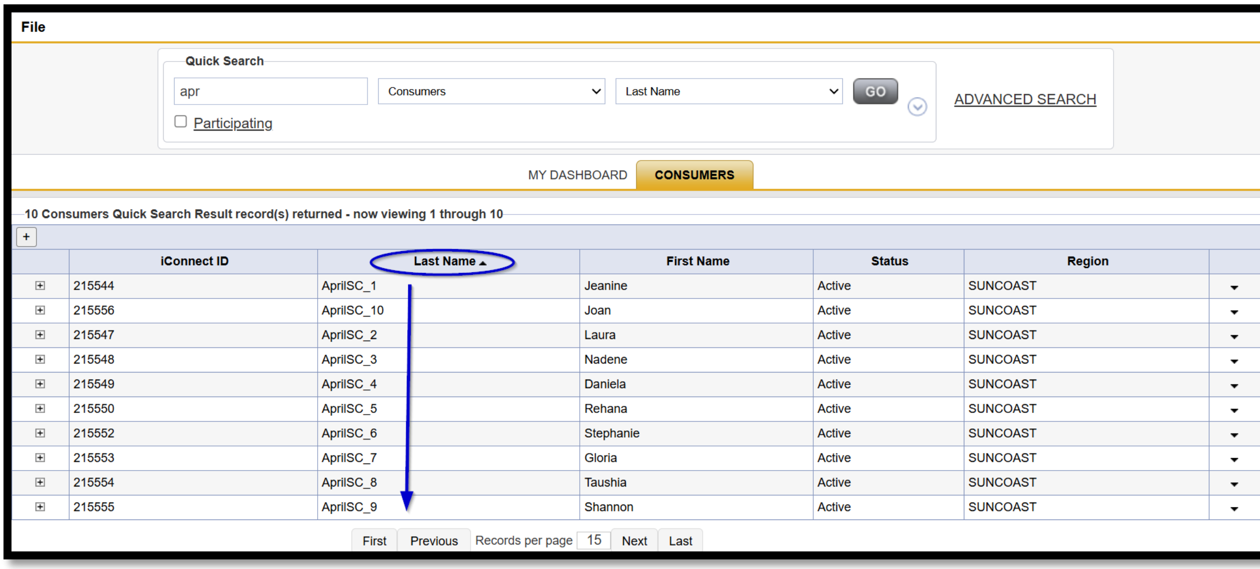
Example from iConnect of an authorization in “Approved” status from the Auth tab, within the list view grid, after opening the authorization, and opening the AuthService tab:



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.



Can iConnect users print the list view grids?

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