

Generating Cost Plan Reports in iConnect.

Introduction

Cost Plan Reports can be generated in iConnect. Some of these reports can be edited, saved, printed, and attached to notes.

Generate a Cost Plan Report

1. To begin, log into iConnect and set Role = WSC/CDC. Click Go.



2. Navigate to the **Plans** tab of the consumer's record and open the existing Plan record.

		Diagnosis	Eligibility M	ledications Auths	Provider Doc	umentation	Contacts	Consumer Module Use		ule User				
		Demographic	s Divisions	Consumer Budgets	Programs	Provider S	Selections	SAN	Notes	Forms	Appointments	Plans	Pre-Enroliment	Cla
Filters														
Division														
Search Reset														
-7 Consult ex Plans record(s) returned - now viewing 1 through 7-														
Division Progr	m Worker		Cost P	lan Creation Date 🗸		R	eview Requ	iest Date	•		Status		Cost Plan Begin	a Date
APD APD Waiver_	Romonitie	06/29/2	023		C	7/01/2023				Draft		07/01/2023	}	

3. From the Plan navigate to the Planned Services tab and go to **Reports** and click **Consumer Cost Plan.**

Plan Information	ner Cos	it Plan				
	M	lax Amoun	t	• +		
Planned Services			Search	Reset		
Cost Plan Review Notes			Gearch	rieses		
	1	7 Consur	ners Planne	ed Services rec	cord(s) returned - now viewing 1 through 7	
	L	+				
		Auth	Provider	Service Code	Service Description	Un Typ
			Provider - 19450	97535:UC	(4290) Supported Living Coaching	15 min
	E	257947	Provider - 19459	\$5102:UC	(4082) Life Skills Development - Level 3 (ADT) - Facility Based	Hou
	8	257947	Provider - 19459	85135:UC	(4080) Life Skills Development - Level 1 (Community Inclusion)	15 min
	8	257947	Provider - 19459	T2021:UC:HI	(4083) Life Skills Development - Level 2 (Supported Employment - Individual)	15 min
	B	258181	Provider - 19459	97110:UC	(4150) Physical Therapy	15 min:
		258181	Provider - 19459	97161:GP:UC	Physical Therapy - Evaluation - 20 minutes	Unit
	E	258181	Provider -	T2003:UC	(4320) Transportation - Trip	Trip



- 4. In the next screen select the date.
 - a. Tip*** if using the beginning of the Cost Plan year doesn't offer results, try using today's date
 - b. Then click View Report

Date 51/2024 12:00:00 AH	View Report
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5. This will launch a new window. Select the file type of choice to open the document. If not edits need to be made, it is recommended to save in PDF.

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	XML file with report data
	CSV (comma delimited)
	PDF
	MHTML (web archive)
	Excel
	TIFF file
	Word

- 6. Save the document to your computer. Edit and print the document if applicable. <u>IMPORTANT</u>: Documents are editable only when they are downloaded and saved to your computer.
- 7. The document can be saved directly to a note by utilizing the **Save to Note** option.

HTML	✓ Export	Save to Note					
Date 5/1/2024 12:00:00 AM	<u></u>						
4 4 1 of 1 ▷ ▷ ¢	Find Next	. •					