

## Generating Cost Plan Reports in iConnect.

### Introduction

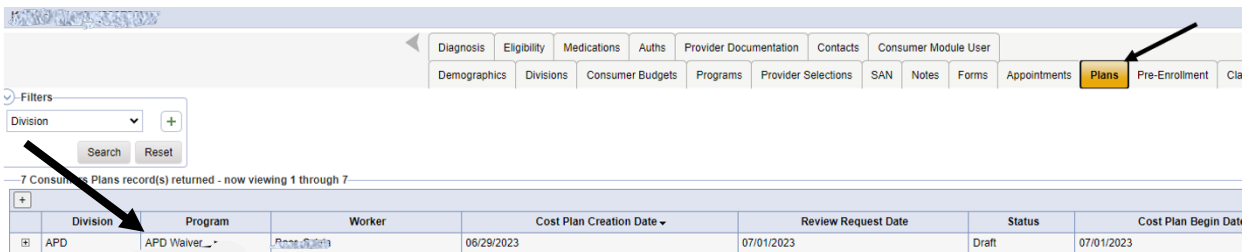
Cost Plan Reports can be generated in iConnect. Some of these reports can be edited, saved, printed, and attached to notes.

### Generate a Cost Plan Report

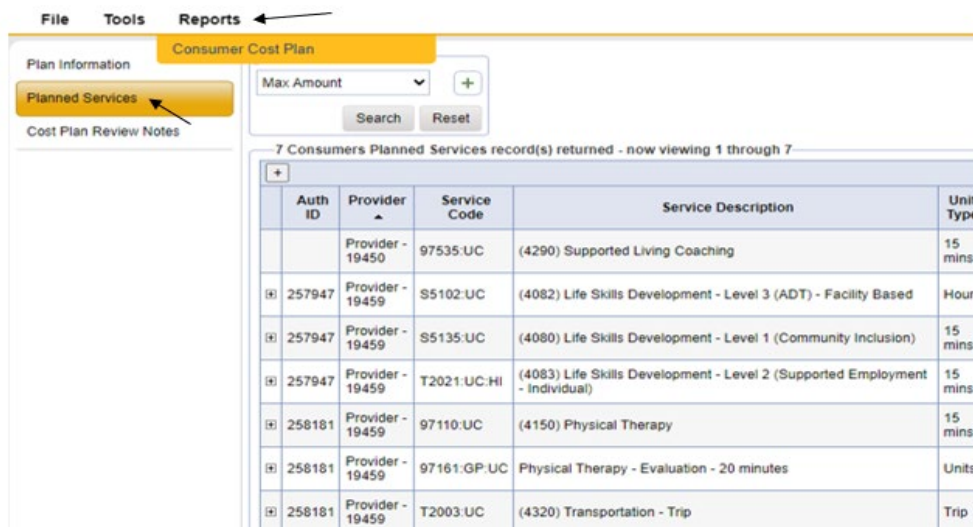
1. To begin, log into iConnect and set Role = WSC/CDC. Click **Go**.



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



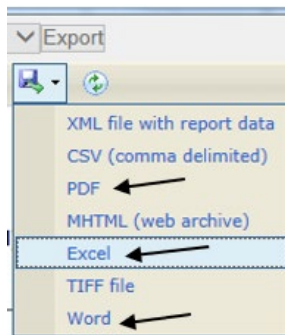
3. From the Plan navigate to the Planned Services tab and go to **Reports** and click **Consumer Cost Plan**.



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**



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.



6. Save the document to your computer. Edit and print the document if applicable.  
***IMPORTANT: 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.

