Utilizing Notes in iConnect

Introduction

Notes in iConnect are a way for Providers, Waiver Support Coordinators (WSCs) and APD staff to communicate and share information while keeping records in either the Provider Record or the Consumer Record. Depending on the workflow, there are specific Note Types, Note Sub-Types, Descriptions, Status, Attachments and Recipients required.

This job aid will encompass the basic skills in using the Note function in iConnect. It is important to visit the appropriate Chapters or Job Aids for the specific tasks and workflows to ensure you use the appropriate responses in the fields.

Objective of this job aid: to understand the importance of using Notes in iConnect and the importance of utilizing the appropriate response in the corresponding field options.

Specific Workflows that use Notes in iConnect:

Behavior
Employment Services - IFS
Expansion Requests
Home Health Care Services (HHCS)
ICF Transitions
Life Skills Development
Quality Assurance
Reactive Strategies
Residential Habilitation
Residential Planning
Supply, Equipment, Adaptation, Emergency Response System and Dental
Supported Living
Support Plan
Therapeutic and Residential Nursing
Waiver Support Coordination (WSC)

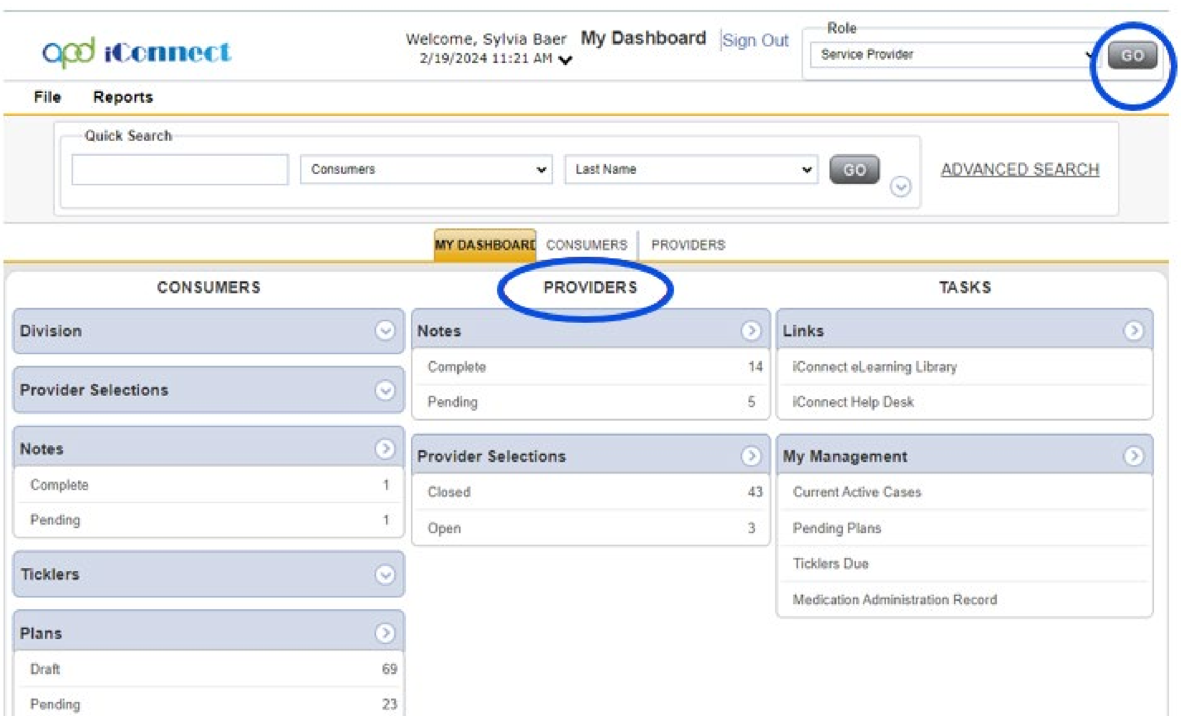
Note Locations in iConnect – Provider Record

Your Role in iConnect will determine your access.

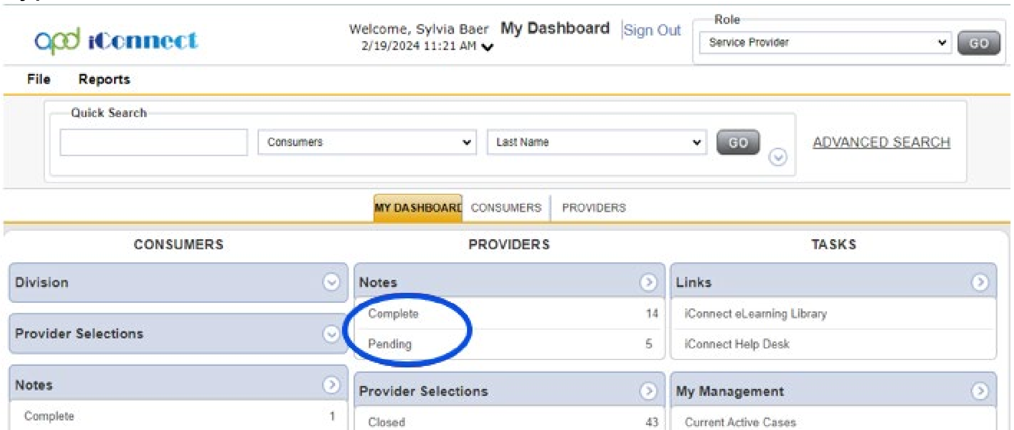
- The Service Provider Role will have access to both the Provider Notes and Consumer Notes.
- WSCs, Service Provider Workers and Provider EVV Managers will only have access to the Consumer's Notes.

1. To begin, log into iConnect and set Role = **Service Provider**. Click **Go.** When you land on **My Dashboard**, you will see columns labeled CONSUMERS and PROVIDERS. Under those corresponding columns are Notes. Notes under the CONSUMERS heading are Notes that were created on the Consumer Record and are part of that consumer's central record. Notes under the Provider Record are notes that were created in the Provider Record and are part of the Provider's record. *If you do not see the heading labeled Notes, that indicates that you do not have any Unread Notes.*

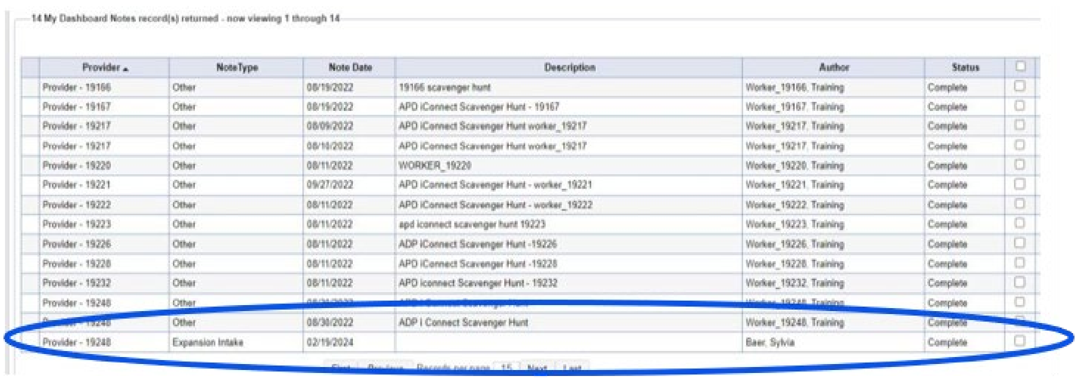
   a. ***It is important to remember that consumer case management related notes should not be included within the provider record and vice versa. Follow the appropriate workflows for plans of remediation and corrective action plans.***



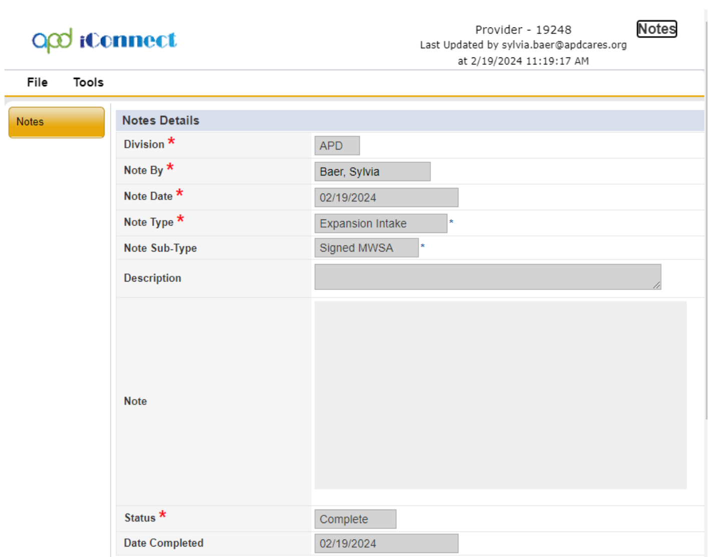
2. To view either Complete Notes or Pending Notes, click the corresponding hyperlink.



3. Click the hyperlink of the Note you want to read. The Note will show once selected.

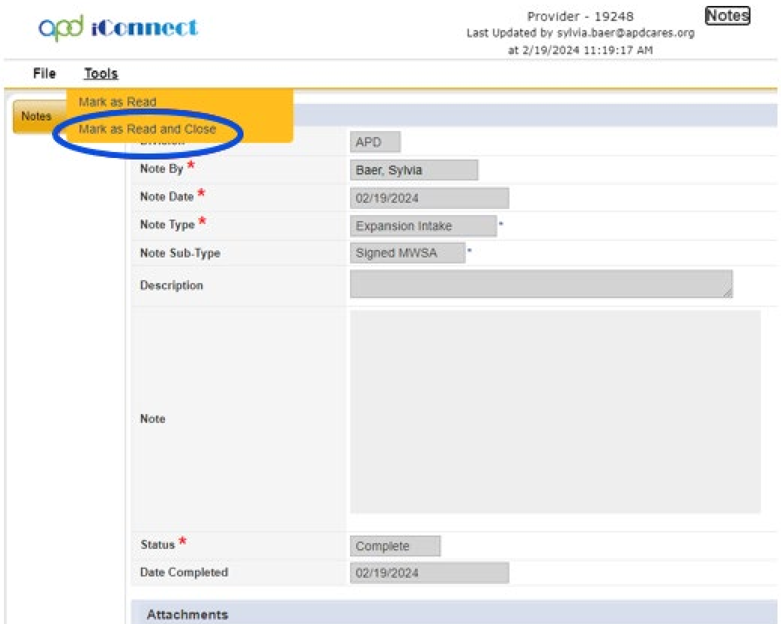

14 My Dashboard Notes record(s) returned - now viewing 1 through 14

Provider	NoteType	Note Date	Description	Author	Status
Provider - 19166	Other	08/19/2022	19166 scavenger hunt	Worker_19166, Training	Complete
Provider - 19167	Other	08/19/2022	APD iConnect Scavenger Hunt - 19167	Worker_19167, Training	Complete
Provider - 19217	Other	08/09/2022	APD iConnect Scavenger Hunt worker_19217	Worker_19217, Training	Complete
Provider - 19217	Other	08/10/2022	APD iConnect Scavenger Hunt worker_19217	Worker_19217, Training	Complete
Provider - 19220	Other	08/11/2022	WORKER_19220	Worker_19220, Training	Complete
Provider - 19221	Other	09/27/2022	APD iConnect Scavenger Hunt - worker_19221	Worker_19221, Training	Complete
Provider - 19222	Other	08/11/2022	APD iConnect Scavenger Hunt - worker_19222	Worker_19222, Training	Complete
Provider - 19223	Other	08/11/2022	apd iconnect scavenger hunt 19223	Worker_19223, Training	Complete
Provider - 19226	Other	08/11/2022	ADP iConnect Scavenger Hunt -19226	Worker_19226, Training	Complete
Provider - 19228	Other	08/11/2022	APD iConnect Scavenger Hunt -19228	Worker_19228, Training	Complete
Provider - 19232	Other	08/11/2022	APD iconnect Scavenger Hunt - 19232	Worker_19232, Training	Complete
Provider - 19248	Other	[illegible]	[illegible]	[illegible]	Complete
[illegible]	Other	08/30/2022	ADP I Connect Scavenger Hunt	Worker_19248, Training	Complete
Provider - 19248	Expansion Intake	02/19/2024		Baer, Sylvia	Complete

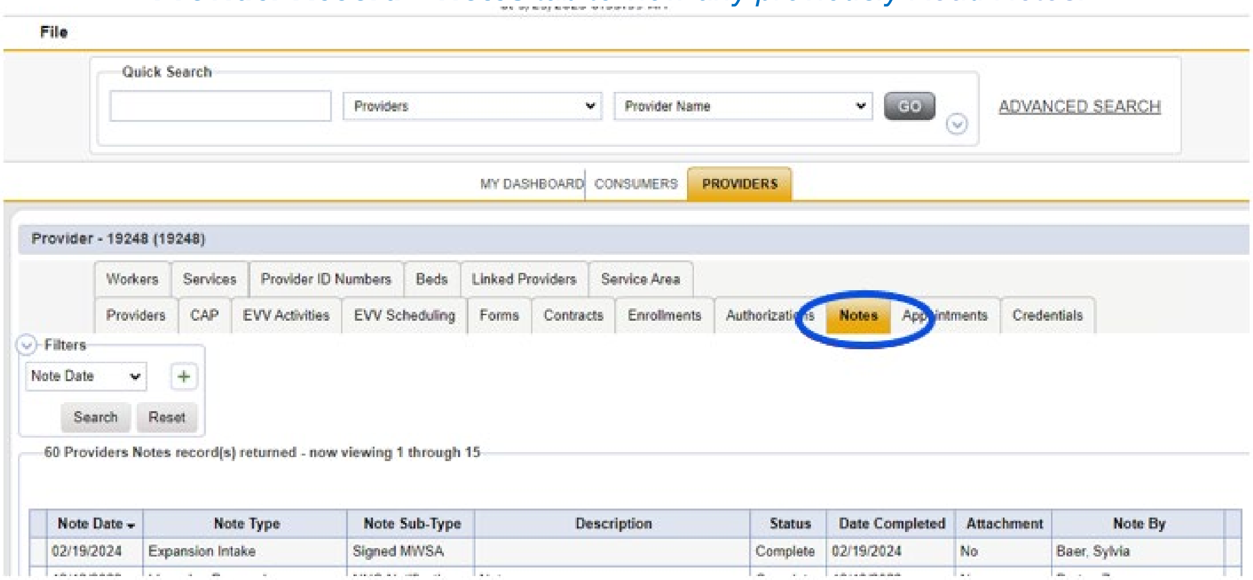


PRO TIP: *Utilizing the filters can assist the user in finding Notes faster.*

4. To remove the Note from your My Dashboard, navigate to **Tools** > **Mark as Read and Close.**



To locate any Note from your Provider Record marked as Read, navigate to your ***Provider Record*** *>* ***Notes*** *tab to view any previously Read Notes.*

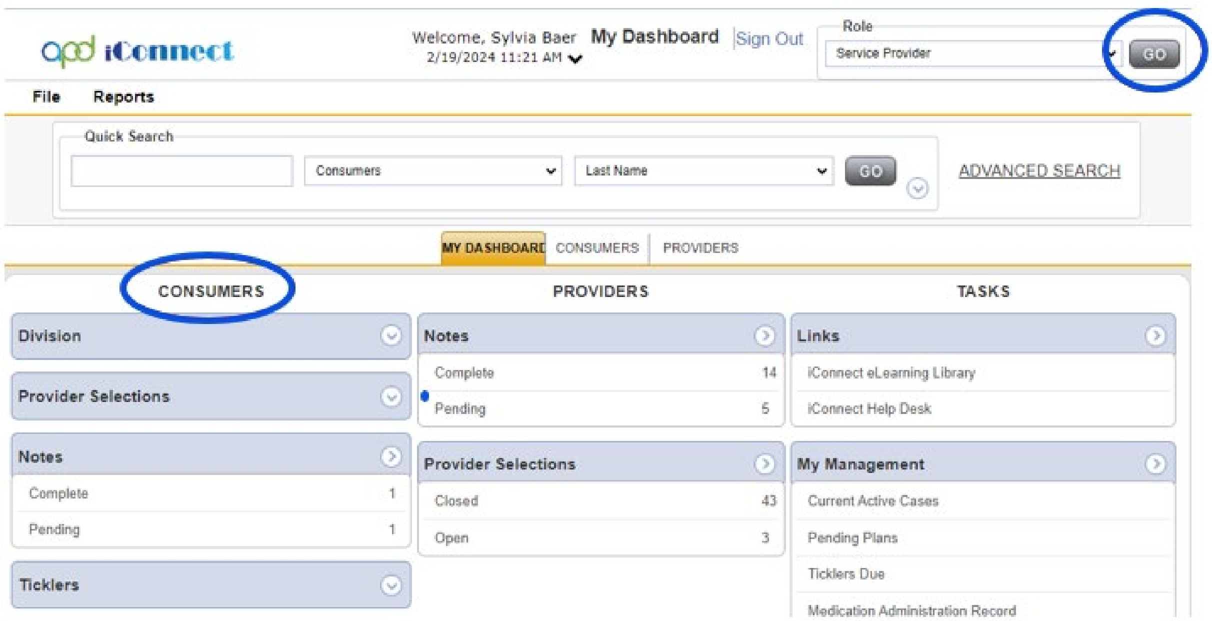


Note Locations in iConnect – Consumer Record

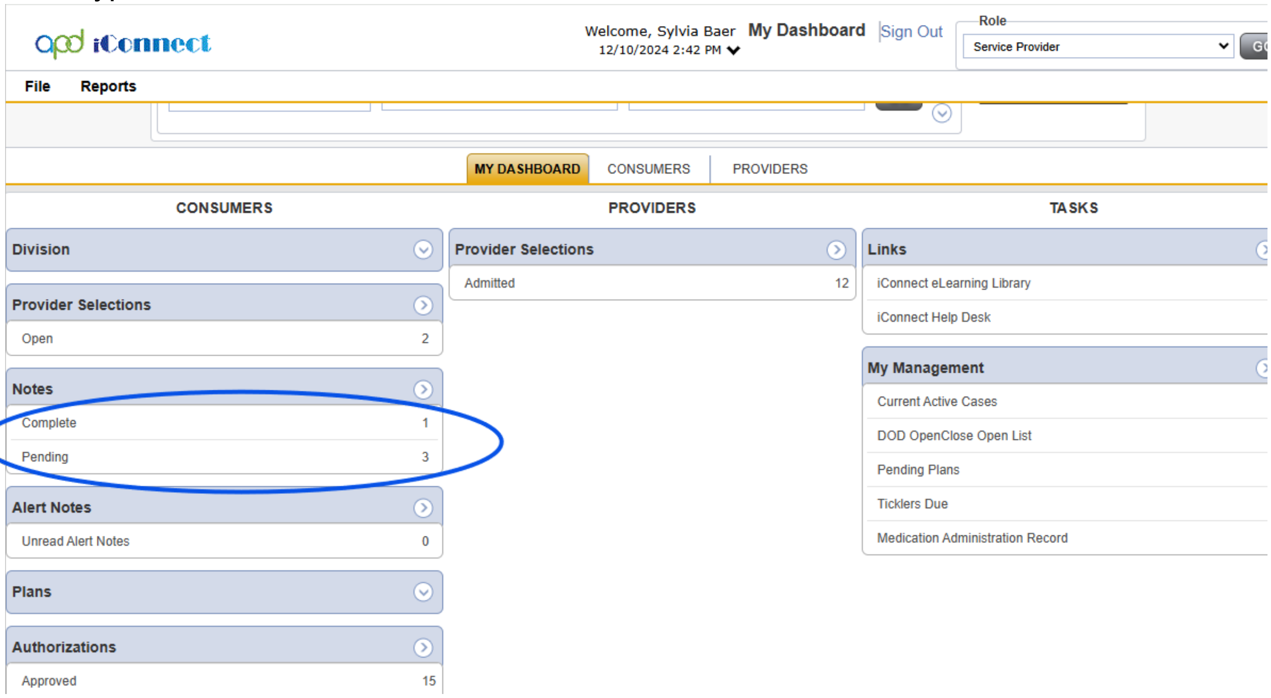
Your Role in iConnect will determine your access. Service Provider, WSC, Service Provider Worker and Provider EVV Manager will have access to the Consumer's Notes.

1. To begin, log into iConnect and set Role = **<u>Service Provider, Service Provider Worker, or WSC</u>**. Click **Go.** When you land on **My Dashboard**, you will see a column labeled CONSUMERS. Notes under the CONSUMERS heading are Notes that were created on the Consumer Record and are part of that consumer's central record. *If you do not see the heading labeled Notes, that indicates that you do not have any Unread Notes.*

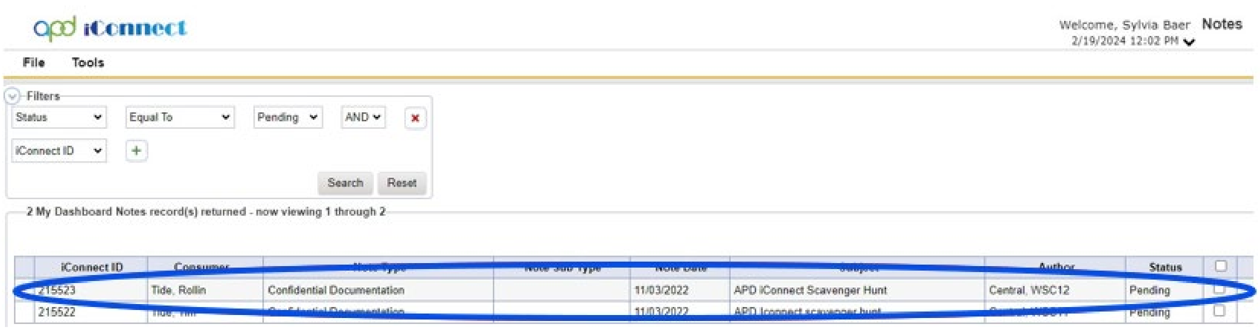
    a. ***It is important to remember that consumer case management related notes should not be included within the provider record and vice versa. Follow the appropriate workflows for plans of remediation and corrective action plans.***

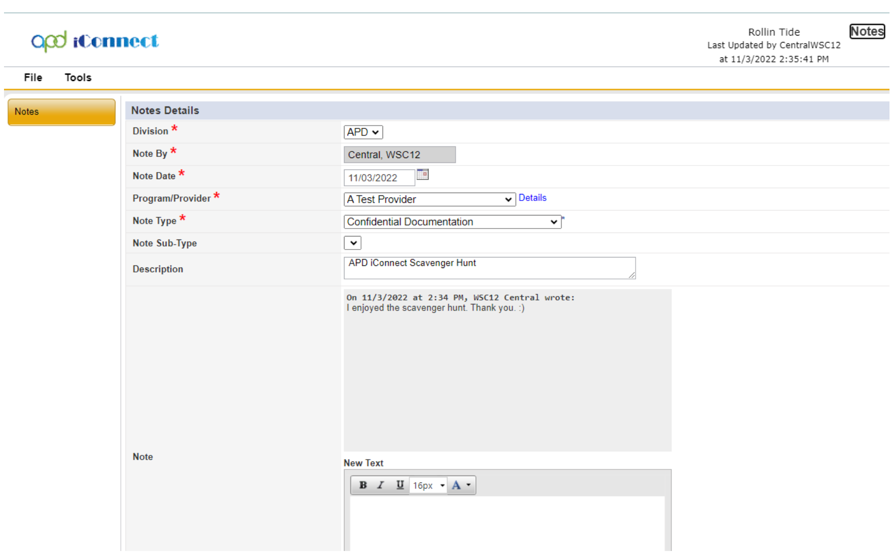


2. To view either Complete Notes or Pending Notes, click the corresponding hyperlink.



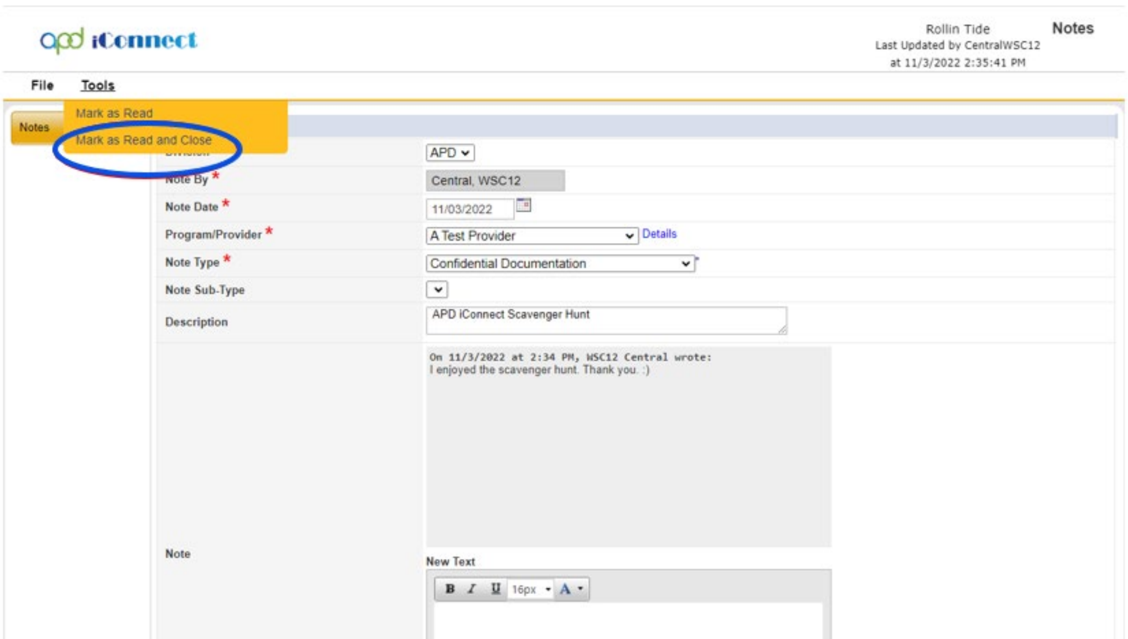
3. Click the hyperlink of the Note you want to read. Once selected, your note will appear.



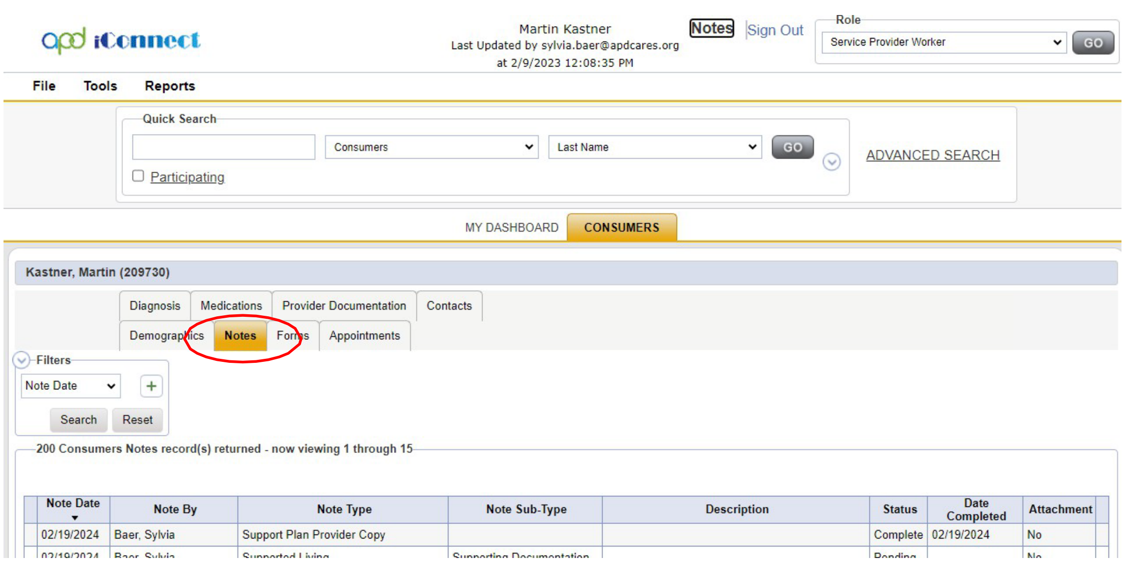


***PRO TIP:** Utilizing the filters can assist the user in finding Notes faster.*

4. To remove the Note from your My Dashboard, navigate to **Tools** > **Mark as Read and Close.** *If you mark a Support Plan or Support Plan Provider Copy Note as Read, you will no longer have access to that Note, therefore make sure to download that document prior to marking it as read OR leave it as unread for future access.*



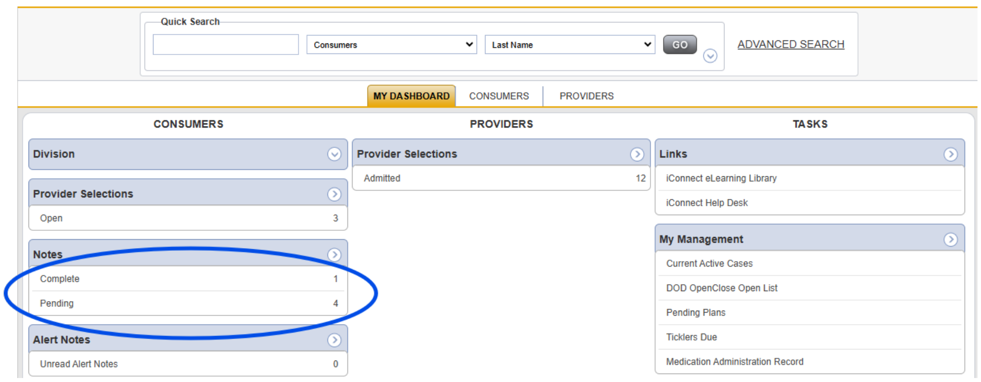
*To locate a Note from the Consumer Record marked as Read, navigate to the **Consumer Record** > **Notes** tab to view any previously Read Notes. This will **NOT** work with Support Plan or Support Plan Provider Copy Note Types.*



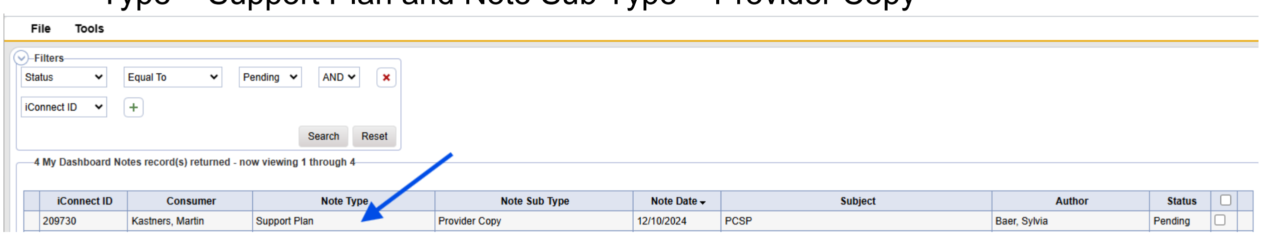
NEW: Note Locations in iConnect – Consumer Record – Support Plan Note

WSCs have 30 days from the effective date of the Person Center Support Plan (PCSP) to send the PCSP to the appropriate providers. The WSCs will send the PCSP in a Note in iConnect within the Consumer's record. WSCs will utilize the WSC Advisory 2021-040 Person Centered Support Plan Updates to assist in developing the Note.

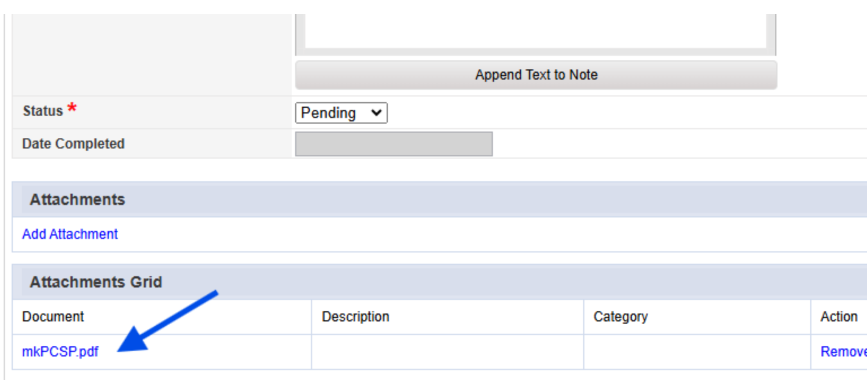
1. Providers will monitor their My Dashboard to view any Pending or Complete Notes.



2. Click either **Pending** or **Complete** to view the list view grid and select the Note Type = Support Plan and Note Sub Type = Provider Copy



3. View the Note and Attachment. The attachment is able to be downloaded.

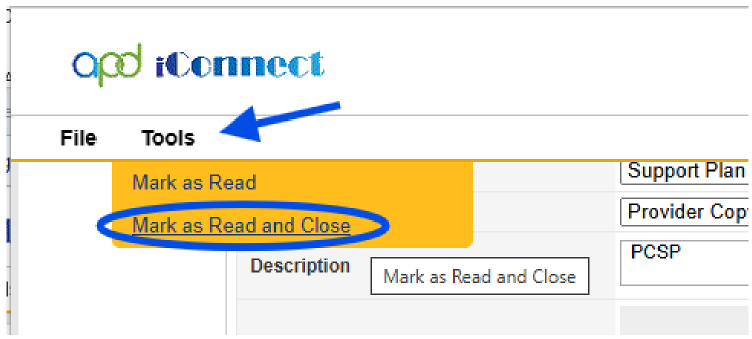


REMINDER: Personal Health Information (PHI) will be included when downloading the PCSP. It is the responsibility of all iConnect users to ensure that their systems follow all HIPAA requirements.

4. The Note will then be closed out. No additional updates should be made to the Note. Do not change the status of the Note.

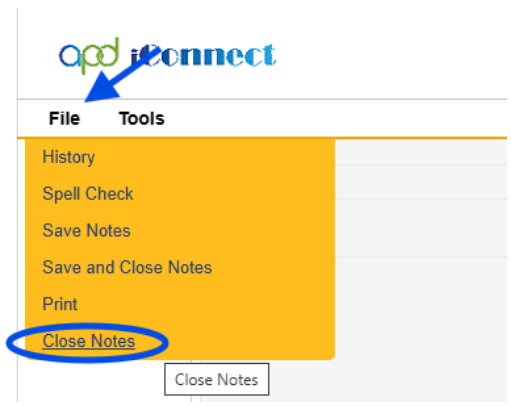
   a. If the PCSP is downloaded, the user will be able to go to **Tools > Mark as Read and Close**

REMINDER: Providers are not required to mark these notes as Read, if they choose to access the PCSP directly from the note as needed.



REMINDER: If the Support Plan note is marked as Read, the provider will no longer have access to that Note.

   b. If the PCSP is **NOT** downloaded, the user will be able to go to **File > Close Notes**



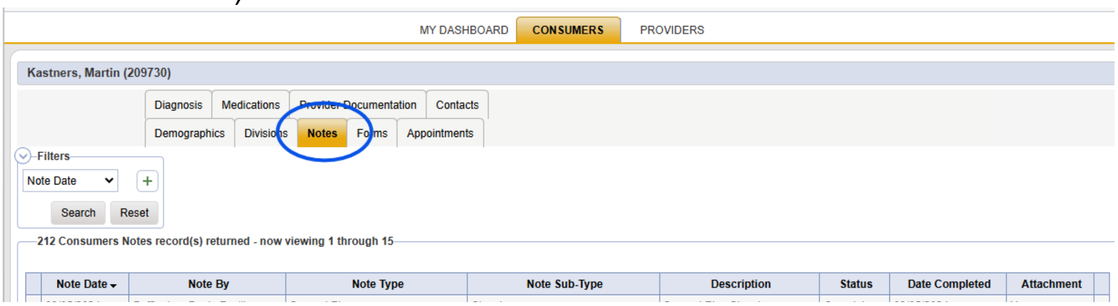
Creating a Note in iConnect

Notes are a way for service providers and WSCs to communicate with APD staff and each other through iConnect. It is crucial that if a Note is needed to be read by an individual that they are added as a Note Recipient. A Note without a Note Recipient is similar to an email in the Drafts folder, no one knows it is there. When creating Notes, it is imperative to follow the proper workflow to ensure that each step is followed. Utilizing the incorrect Note Type or Note Sub-Type could cause issues for the recipient, which could potentially jeopardize services for our consumers. Utilize the links provided earlier to ensure that you follow the appropriate workflow.

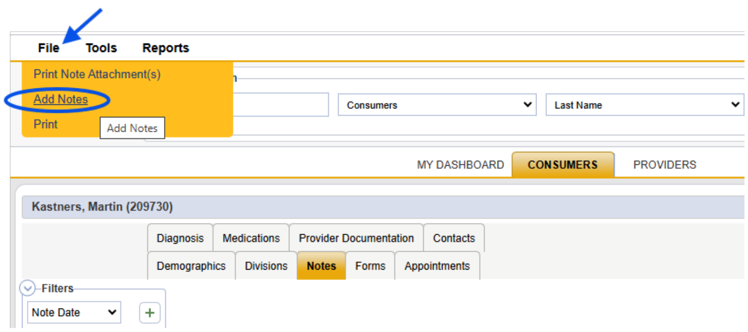
NEW: Uploading Attachments and Adding Note Recipients

There are times in which a user needs to upload a document in iConnect. This is done in the Notes tab of either the Consumer's record or the Provider's record, depending on the documentation being uploaded. The user may need to update the name of a file with iConnect as well when attaching the document.

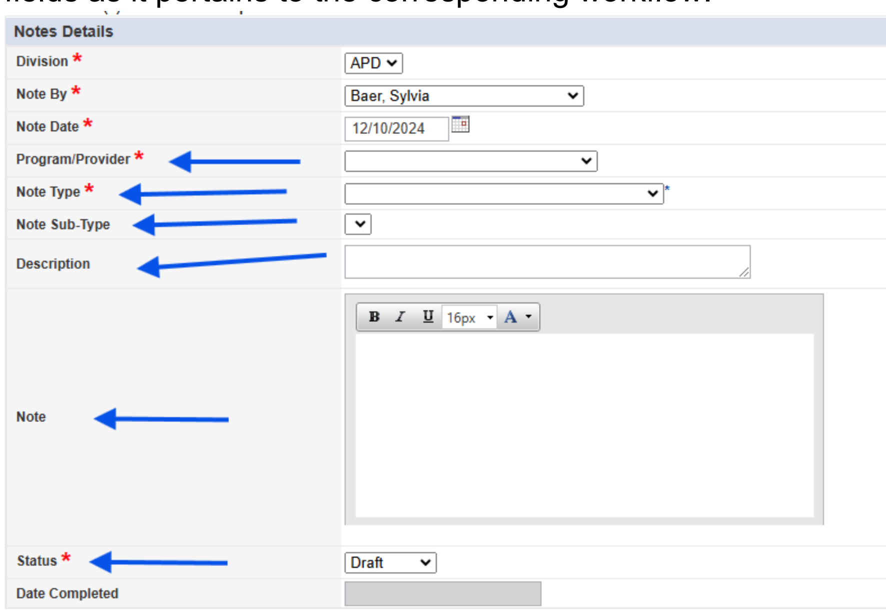
1. Navigate to the Notes tab of the appropriate record (Consumer's record or Provider's record).



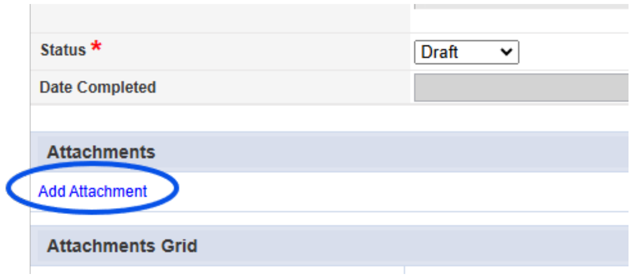
2. Go to **File > Add Notes**



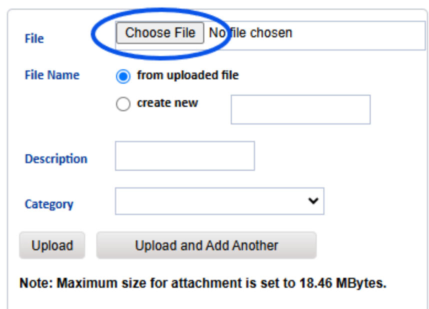
3. Fill out the fields as it pertains to the corresponding workflow.



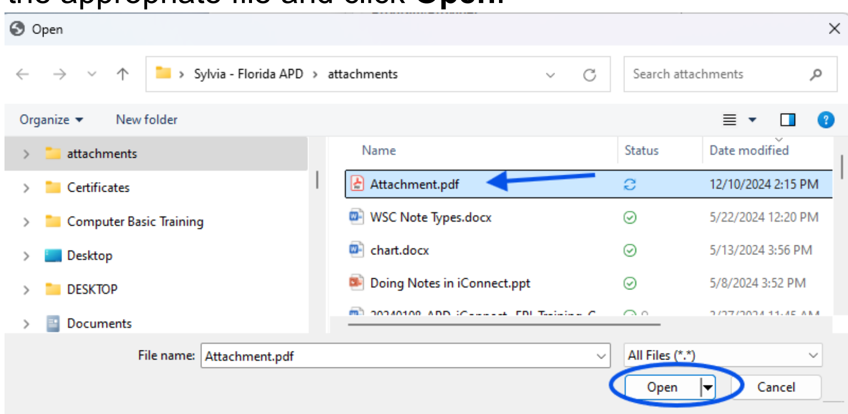
4. If an attachment is needed, click **Add Attachment**



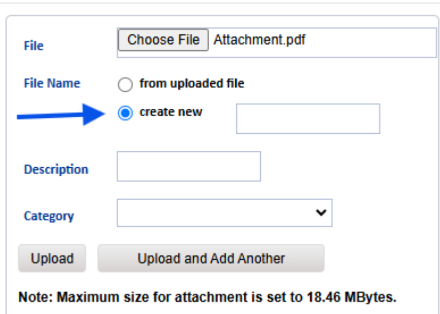
5. A pop-up will display. Click **Choose File**



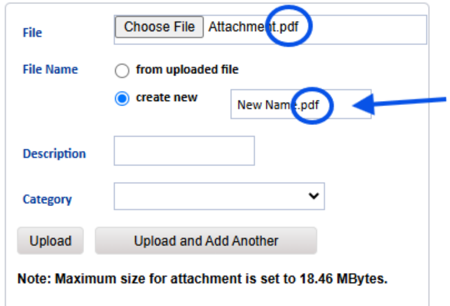
6. Select the appropriate file and click **Open**.



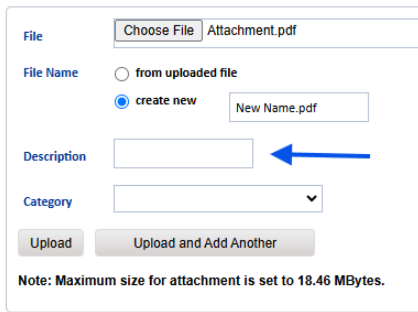
7. ***PRO TIP:*** *The user can create a new name for the attachment to make the attachment easier to identify.*
   a. Click the **create new** radio button



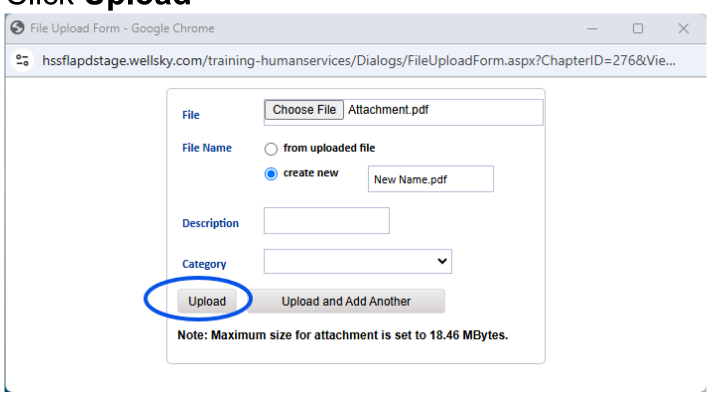
b. Type in the new name along with the extension of the file. The extension should match the original extension.



c. Add a description if needed.

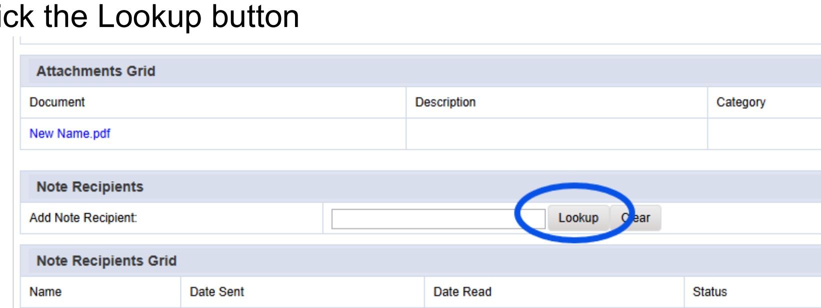


d. Click **Upload**

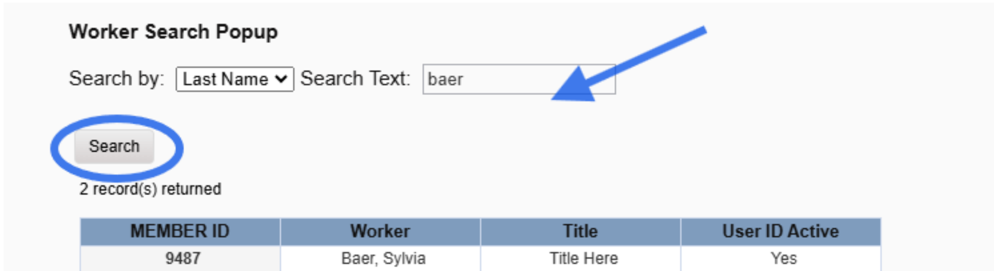


PRO TIP:** If there are multiple attachments needed in the same note, choose **Upload and Add Another

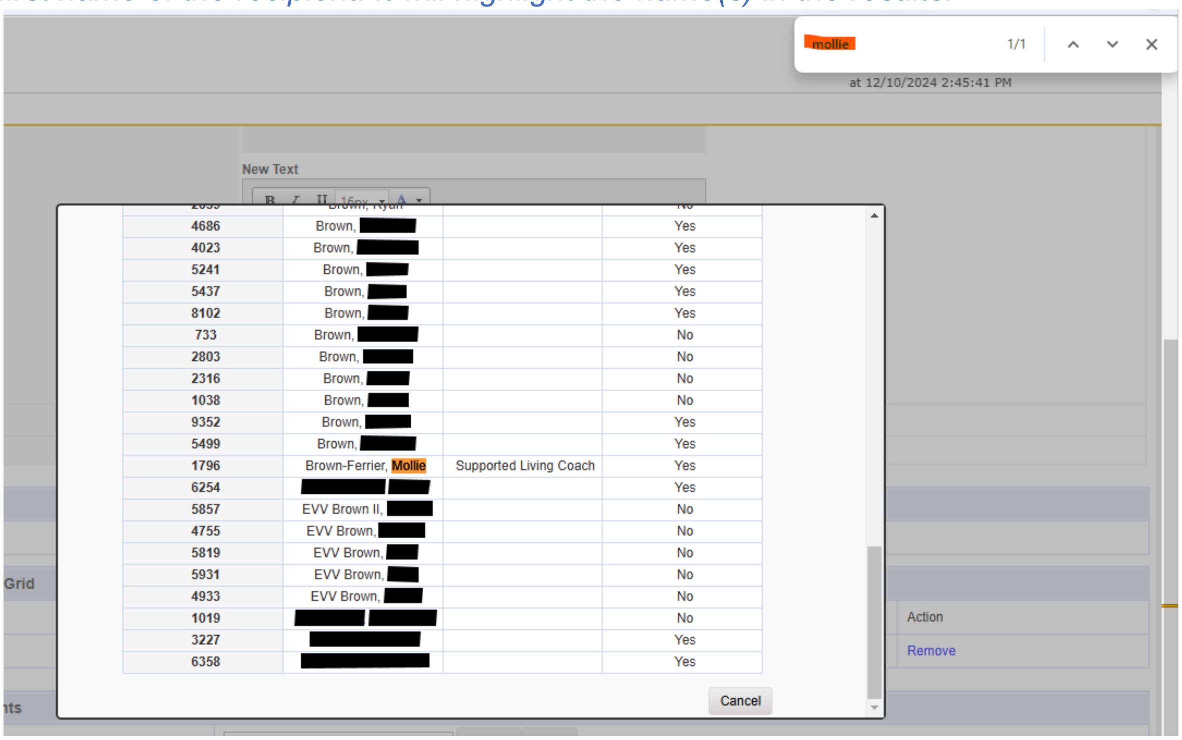
8. Add needed Note Recipients as indicated in the appropriate workflows.
   a. Click the Lookup button



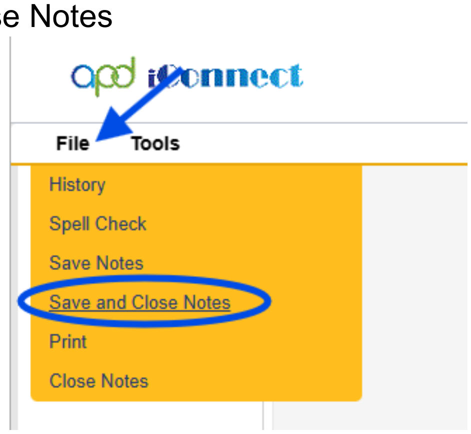
b. Type in the name of the Note Recipient and click **Search.** Click the correct Note Recipient.



__PRO TIP:__ Utilize the Ctrl + F keyboard short cut can assist in the search if the Last Name yields several results. Utilizing the keyboard click __Ctrl__ + __F__ and type in the first name of the recipient. It will highlight the name(s) in the results.



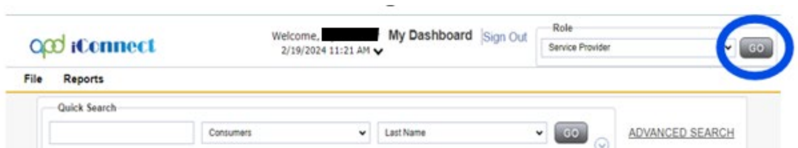
9. Go to File > Save and Close Notes



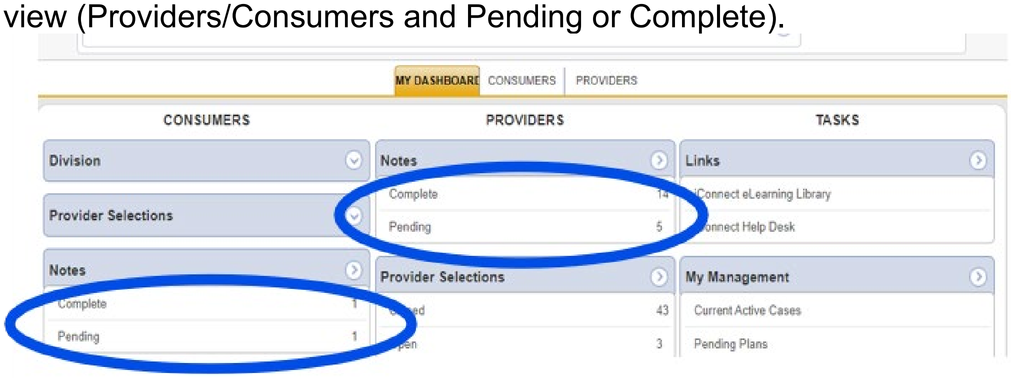
Best Practices with Notes in iConnect

There are some best practices to help ensure that all iConnect users are successful with iConnect.

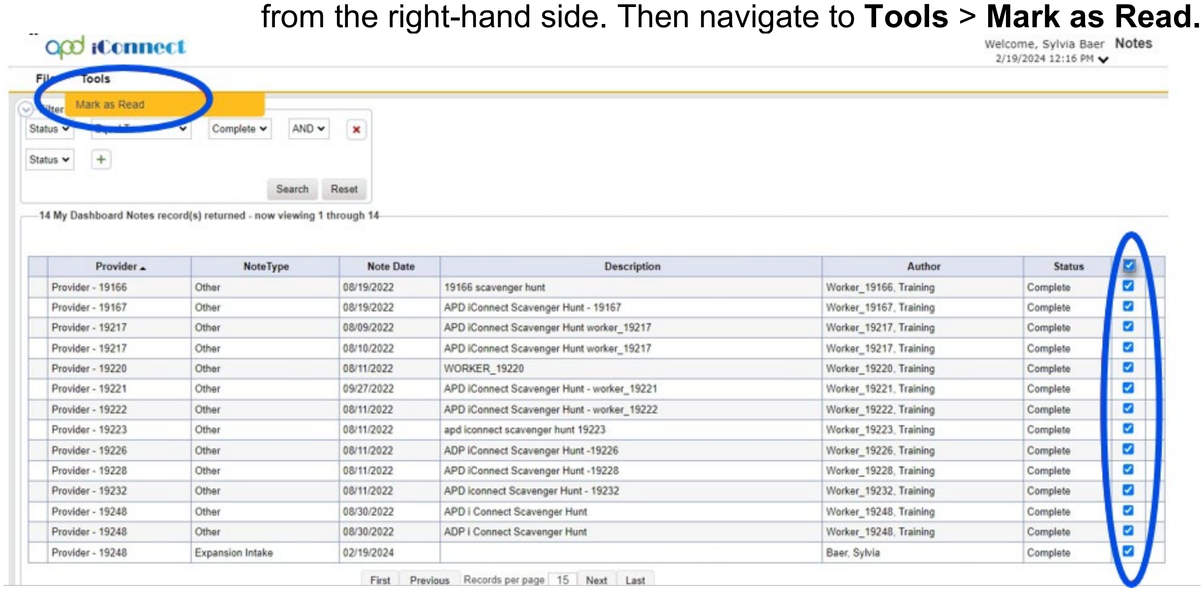
1. Apart from the Support Plan Provider Copy Note and the Support Plan Notes (for Providers of Non-WSC services), it is best practice for ALL providers to mark Notes as Read to clear your My Dashboard.
    a. Notes can also be marked as read from the list view of your Notes from your My Dashboard.
        i. Once logged into iConnect, select your appropriate Role and press **Go**.



ii. On your My Dashboard, you will click the Notes you want to view (Providers/Consumers and Pending or Complete).

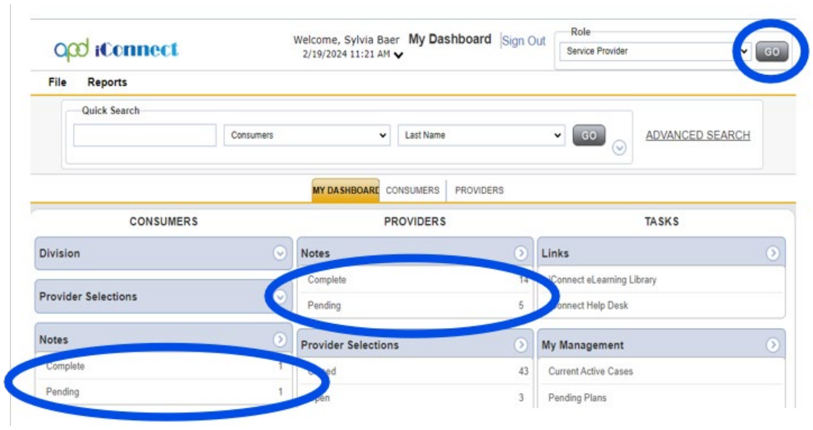


iii. From the list grid view, you can check mark all or a few of the Notes from the right-hand side. Then navigate to **Tools** > **Mark as Read.**

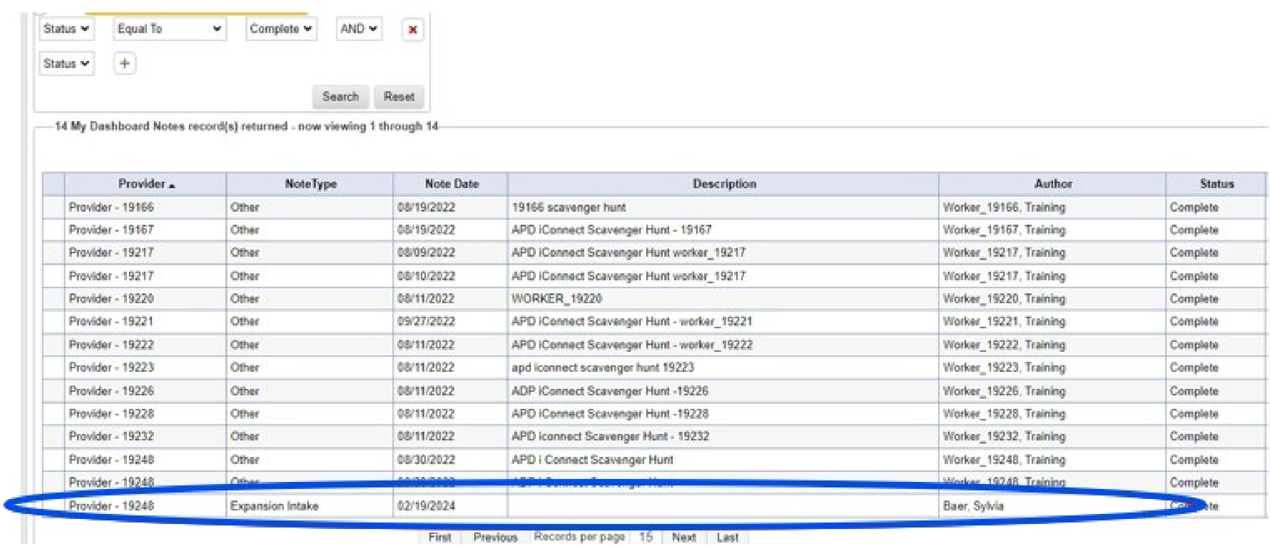


b. Notes can also be marked as read from the opened Note.

i. Once logged into iConnect, select your appropriate Role and press **Go**. On your My Dashboard, you will click the Notes you want to view (Providers/Consumers and Pending or Complete).

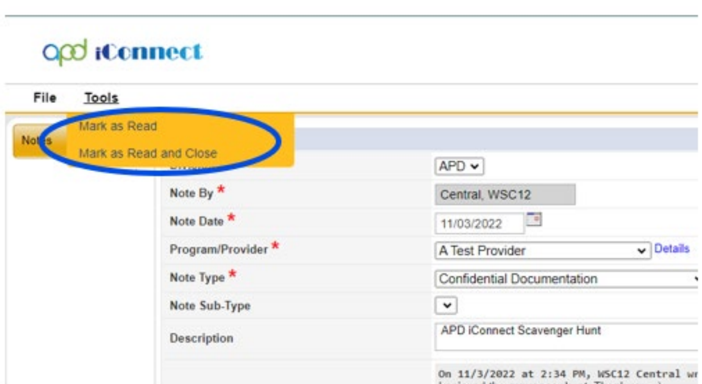


ii. Select the Note you want to view.



Provider	NoteType	Note Date	Description	Author	Status
Provider - 19166	Other	08/19/2022	19166 scavenger hunt	Worker_19166, Training	Complete
Provider - 19167	Other	08/19/2022	APD iConnect Scavenger Hunt - 19167	Worker_19167, Training	Complete
Provider - 19217	Other	08/09/2022	APD iConnect Scavenger Hunt worker_19217	Worker_19217, Training	Complete
Provider - 19217	Other	08/10/2022	APD iConnect Scavenger Hunt worker_19217	Worker_19217, Training	Complete
Provider - 19220	Other	08/11/2022	WORKER_19220	Worker_19220, Training	Complete
Provider - 19221	Other	09/27/2022	APD iConnect Scavenger Hunt - worker_19221	Worker_19221, Training	Complete
Provider - 19222	Other	08/11/2022	APD iConnect Scavenger Hunt - worker_19222	Worker_19222, Training	Complete
Provider - 19223	Other	08/11/2022	apd iconnect scavenger hunt 19223	Worker_19223, Training	Complete
Provider - 19226	Other	08/11/2022	ADP iConnect Scavenger Hunt -19226	Worker_19226, Training	Complete
Provider - 19228	Other	08/11/2022	APD iConnect Scavenger Hunt -19228	Worker_19228, Training	Complete
Provider - 19232	Other	08/11/2022	APD iconnect Scavenger Hunt - 19232	Worker_19232, Training	Complete
Provider - 19248	Other	08/30/2022	APD i Connect Scavenger Hunt	Worker_19248, Training	Complete
Provider - 19248	Other	08/30/2022	APD i Connect Scavenger Hunt	Worker_19248, Training	Complete
Provider - 19248	Expansion Intake	02/19/2024		Baer, Sylvia	Complete

iii. Then navigate to **Tools** > **Mark as Read or Mark as Read and Close.**

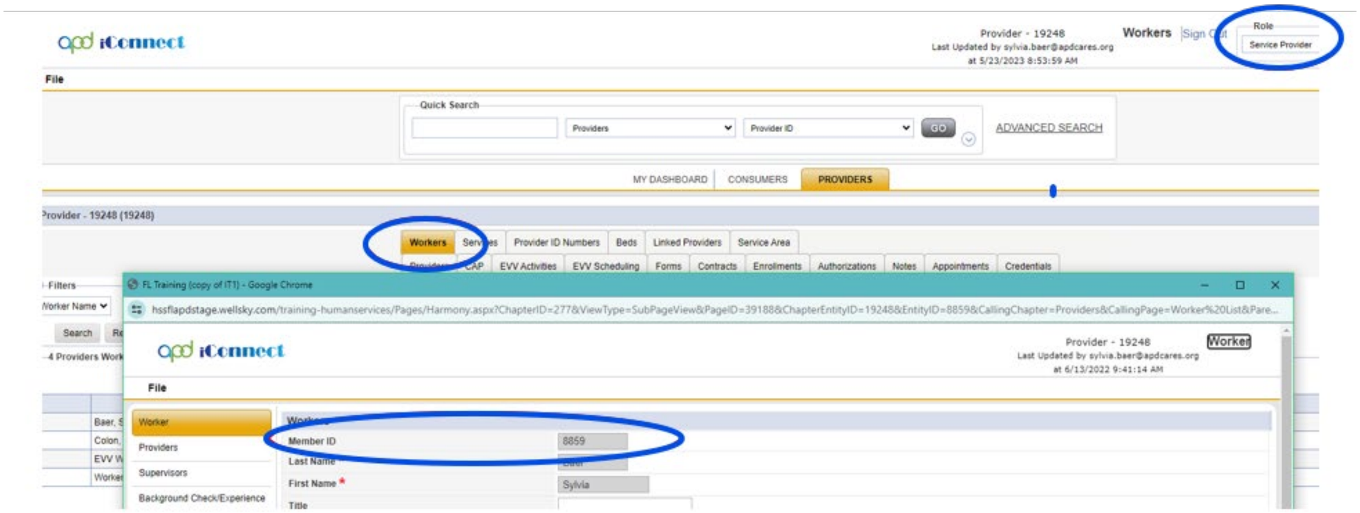


2. Ensure the correct Note Recipient.
    a. If you see that there are two individuals with the same name when searching for the worker as a Note Recipient, reach out to the individual and inquire into the Member ID.

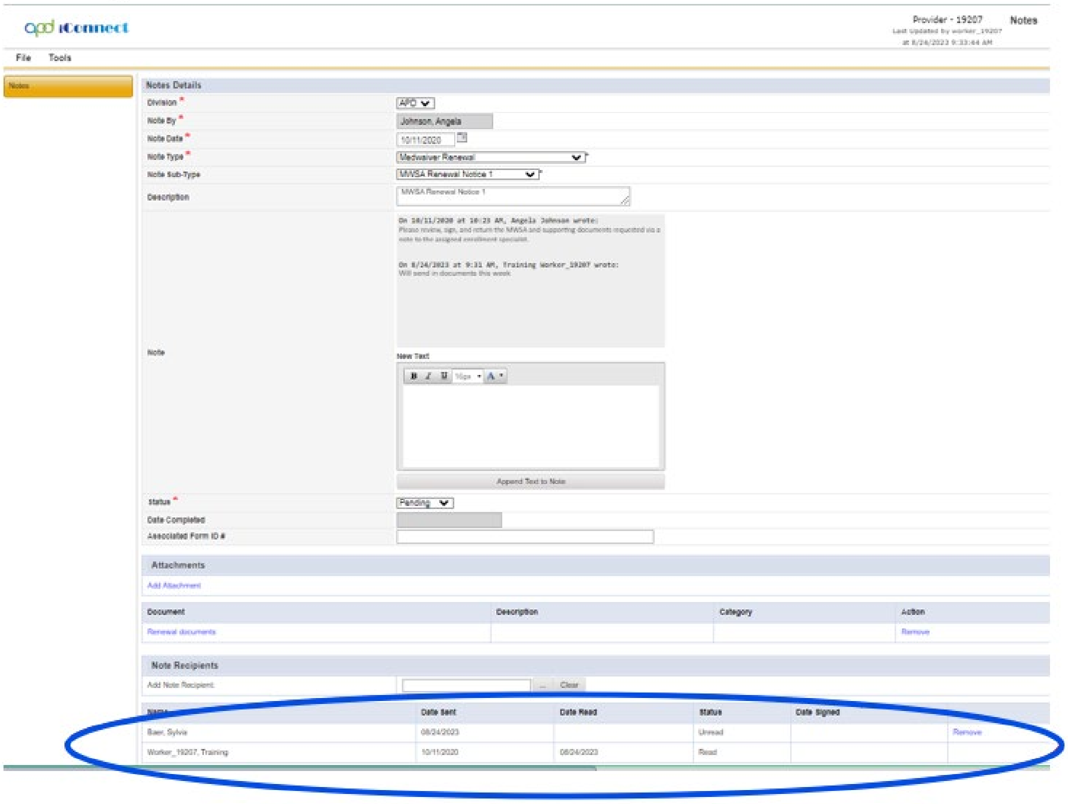
688	Smith, Jessica
5135	Smith, Jessica

    b. To find your Member ID, the Service Provider (Owner) can go to their **Provider Record** > **Workers** and <u>select the Worker's name</u>. The screen will show their Member ID for their agency. (Workers will have a different Member ID for each Agency they work for.)

***PRO TIP**: The Service Provider (Owner) can edit the title for their employee in order to ensure that the worker can be easily identified as an employee for their organization.*



3. Verify if a Note Recipient has "Read" the Note to determine if they need to be added again.
    a. Navigate to the Note you want to verify. Then scroll down to see the Note Recipients.



Note Recipients

Add Note Recipient: ... Clear

Name	Date Sent	Date Read	Status	Date Signed	
Baer, Sylvia	08/24/2023		Unread		Remove
Worker_19207, Training	10/11/2020	08/24/2023	Read		

b. If the Note is marked Unread, that means the Note is still on the recipient's My Dashboard. If the Note is marked Read, that means the Note is no longer on the recipient's My Dashboard. User will be able to resend the Note to that user if needed.

i. **Unread** – The Note is on the recipient's My Dashboard.

ii. **Read –** The Note is no longer on the recipient's My Dashboard.

Troubleshooting

There are times when things do not go as planned. This section will help you to determine why there might be issues with the Notes in iConnect.

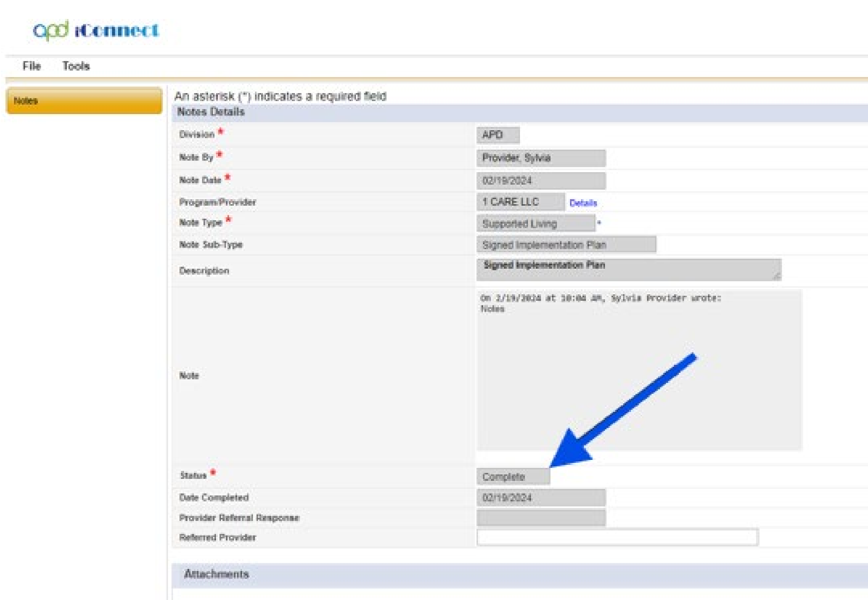
1. Not getting a response to the Note I sent, or I was told I was added to a Note and I don't see it.
   a. Incorrect Recipient- Check the name of the recipients and determine if the name was incorrect or if they have a different Member ID number. Reference Best Practices with Notes in iConnect Number 2.

   b. Verify that the correct Note Type and Note Sub-Type was used in the workflow. (Not all providers have access to the same Note Types and Note Sub-Types.)

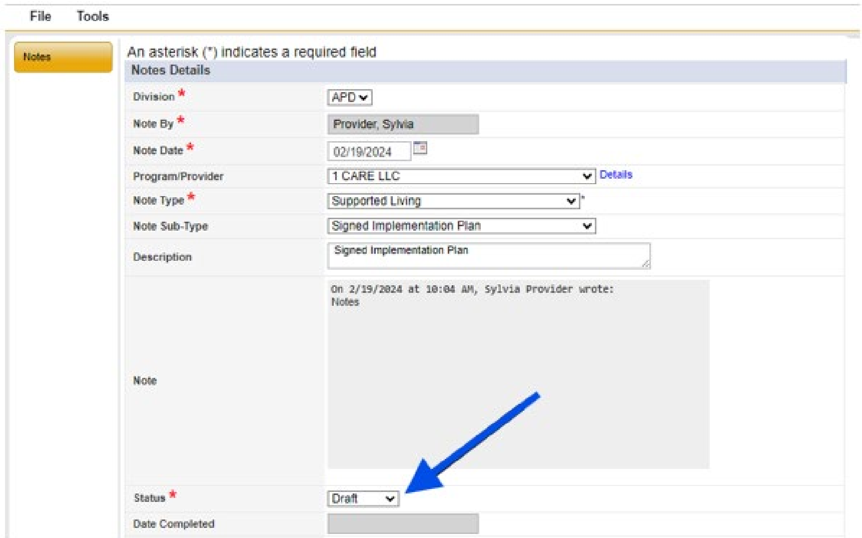
   c. Verify the Note was done on the proper Record. For example: If a Provider sent a Note to a WSC from the Provider Record, the WSC would not have access to that Note, since it is not part of the Consumer Record.

2. I am unable to respond to a Note or I was informed that a recipient was not able to respond to my Note that I sent.

   a. Check the Status of the Note. Notes in Complete status can no longer be edited. To change the Status of a Complete Note, a ticket request must be done. Not all Notes are allowed to be reversed and a New Note may need to be done.

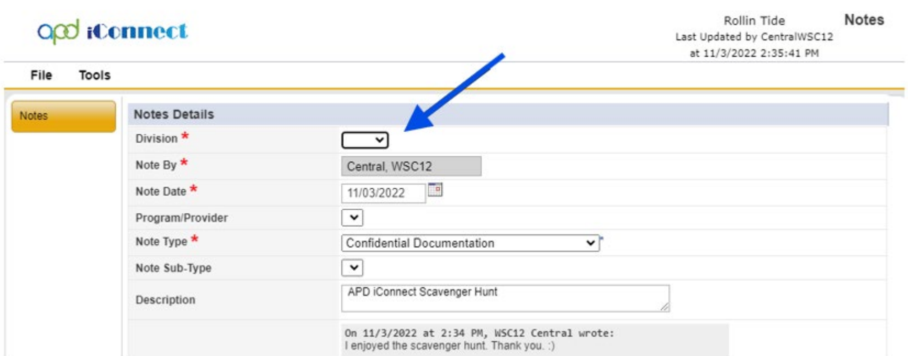


b. If the Note is in Draft Status, only the creator can respond to the Note. The creator will need to follow the appropriate workflow and change the status of the Note.



3. I am not able to Save the Note I am creating.

   a. If you are not able to Save due to the Division not populating, contact your Regional iConnect Trainer.



   b. If you are not able to Save due to the Program/Provider not showing your Agency, contact the WSC and asked to be added to the Provider Selection Tab of the Consumer's Record.