

## 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](#)

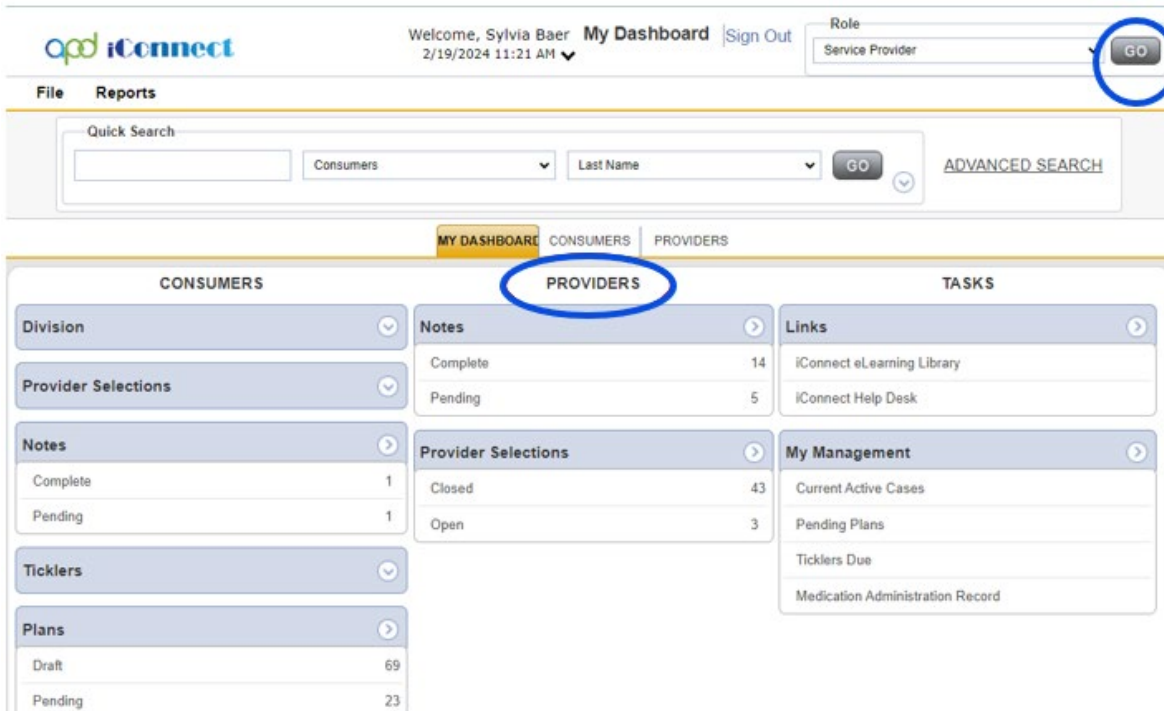
[Therapeutic and Residential Nursing](#)

[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.*



APD iConnect | Welcome, Sylvia Baer | My Dashboard | Sign Out | Role: Service Provider | GO

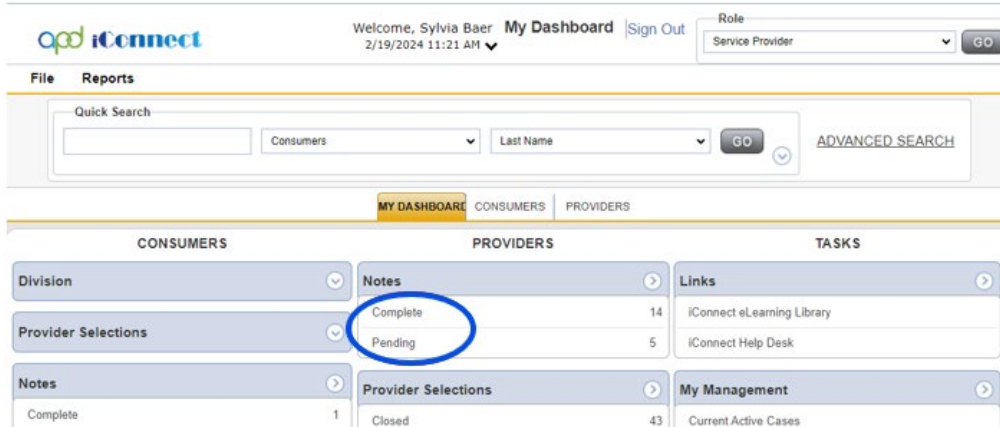
File Reports

Quick Search:  Consumers Last Name  GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS PROVIDERS

CONSUMERS	PROVIDERS	TASKS
<p>Division</p> <p>Provider Selections</p> <p>Notes</p> <ul style="list-style-type: none"> <li>Complete: 1</li> <li>Pending: 1</li> </ul> <p>Ticklers</p> <p>Plans</p> <ul style="list-style-type: none"> <li>Draft: 69</li> <li>Pending: 23</li> </ul>	<p>Notes</p> <ul style="list-style-type: none"> <li>Complete: 14</li> <li>Pending: 5</li> </ul> <p>Provider Selections</p> <ul style="list-style-type: none"> <li>Closed: 43</li> <li>Open: 3</li> </ul>	<p>Links</p> <ul style="list-style-type: none"> <li>iConnect eLearning Library</li> <li>iConnect Help Desk</li> </ul> <p>My Management</p> <ul style="list-style-type: none"> <li>Current Active Cases</li> <li>Pending Plans</li> <li>Ticklers Due</li> <li>Medication Administration Record</li> </ul>

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

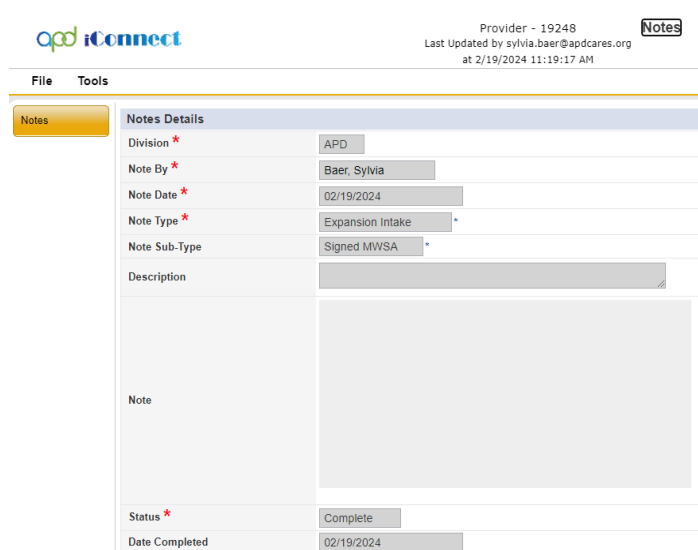


The screenshot shows the iConnect dashboard for a Service Provider. The 'MY DASHBOARD' tab is active. Under the 'CONSUMERS' section, there are two links for 'Notes': 'Complete' and 'Pending'. The 'Complete' link is circled in blue, indicating it should be clicked to view complete notes.

- 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	Note Type	Note Date	Description	Author	Status	
Provider - 19166	Other	08/19/2022	19166 scavenger hunt	Worker_19166, Training	Complete	<input type="checkbox"/>
Provider - 19167	Other	08/19/2022	APD iConnect Scavenger Hunt - 19167	Worker_19167, Training	Complete	<input type="checkbox"/>
Provider - 19217	Other	08/09/2022	APD iConnect Scavenger Hunt worker_19217	Worker_19217, Training	Complete	<input type="checkbox"/>
Provider - 19217	Other	08/18/2022	APD iConnect Scavenger Hunt worker_19217	Worker_19217, Training	Complete	<input type="checkbox"/>
Provider - 19220	Other	08/11/2022	WORKER_19220	Worker_19220, Training	Complete	<input type="checkbox"/>
Provider - 19221	Other	09/27/2022	APD iConnect Scavenger Hunt - worker_19221	Worker_19221, Training	Complete	<input type="checkbox"/>
Provider - 19222	Other	08/11/2022	APD iConnect Scavenger Hunt - worker_19222	Worker_19222, Training	Complete	<input type="checkbox"/>
Provider - 19223	Other	08/11/2022	apd iconnect scavenger hunt 19223	Worker_19223, Training	Complete	<input type="checkbox"/>
Provider - 19226	Other	08/11/2022	ADP iConnect Scavenger Hunt -19226	Worker_19226, Training	Complete	<input type="checkbox"/>
Provider - 19228	Other	08/11/2022	APD iConnect Scavenger Hunt -19228	Worker_19228, Training	Complete	<input type="checkbox"/>
Provider - 19232	Other	08/11/2022	APD iConnect Scavenger Hunt -19232	Worker_19232, Training	Complete	<input type="checkbox"/>
Provider - 19248	Other	08/30/2022	ADP i Connect Scavenger Hunt	Worker_19248, Training	Complete	<input type="checkbox"/>
Provider - 19248	Expansion Intake	02/19/2024		Baer, Sylvia	Complete	<input type="checkbox"/>

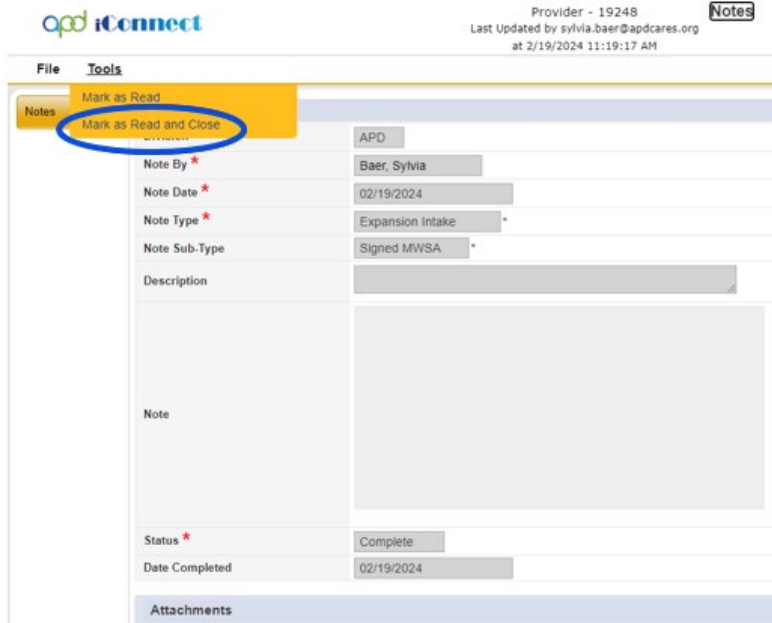


The screenshot shows the 'Notes' details page for a note with ID 19248. The note is titled 'Expansion Intake' and was created by Sylvia Baer on 02/19/2024. The status is 'Complete'.

Field	Value
Division *	APD
Note By *	Baer, Sylvia
Note Date *	02/19/2024
Note Type *	Expansion Intake
Note Sub-Type	Signed MWSA *
Description	
Note	
Status *	Complete
Date Completed	02/19/2024

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

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

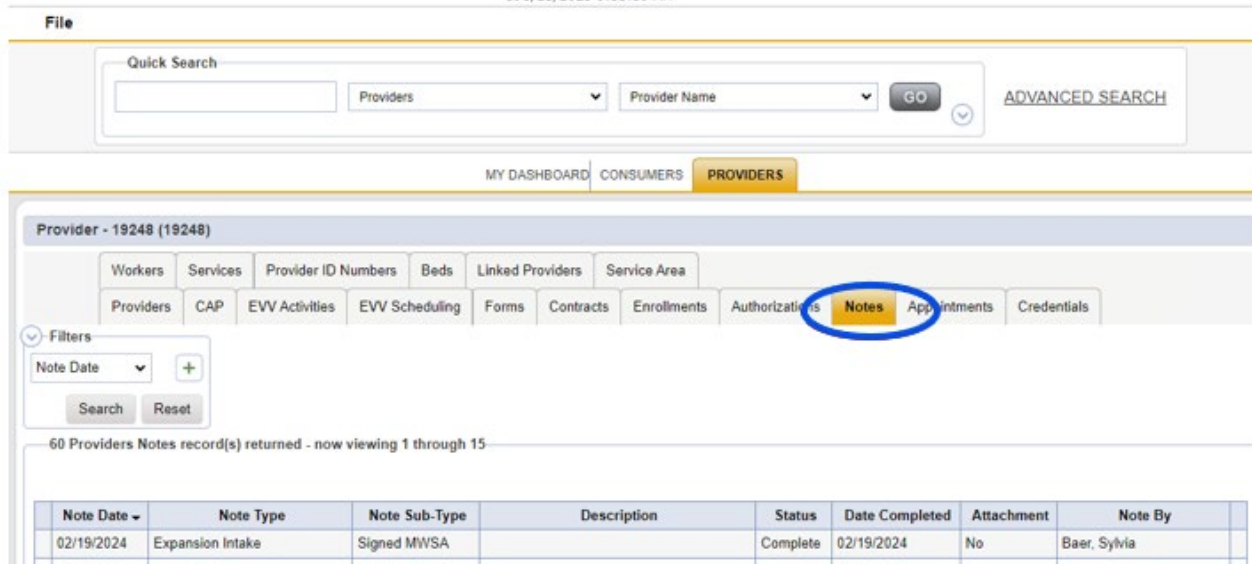


Provider - 19248  
 Last Updated by sylvia.baer@apdcares.org  
 at 2/19/2024 11:19:17 AM

**File Tools**  
 Notes **Mark as Read and Close**

Note By \* Baer, Sylvia  
 Note Date \* 02/19/2024  
 Note Type \* Expansion Intake  
 Note Sub-Type Signed MWSA  
 Description  
 Note  
 Status \* Complete  
 Date Completed 02/19/2024  
 Attachments

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



**File**  
 Quick Search  
 Providers Provider Name GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS **PROVIDERS**

Provider - 19248 (19248)  
 Workers Services Provider ID Numbers Beds Linked Providers Service Area  
 Providers CAP EVV Activities EVV Scheduling Forms Contracts Enrollments Authorizations **Notes** Appointments Credentials

Filters  
 Note Date +  
 Search Reset

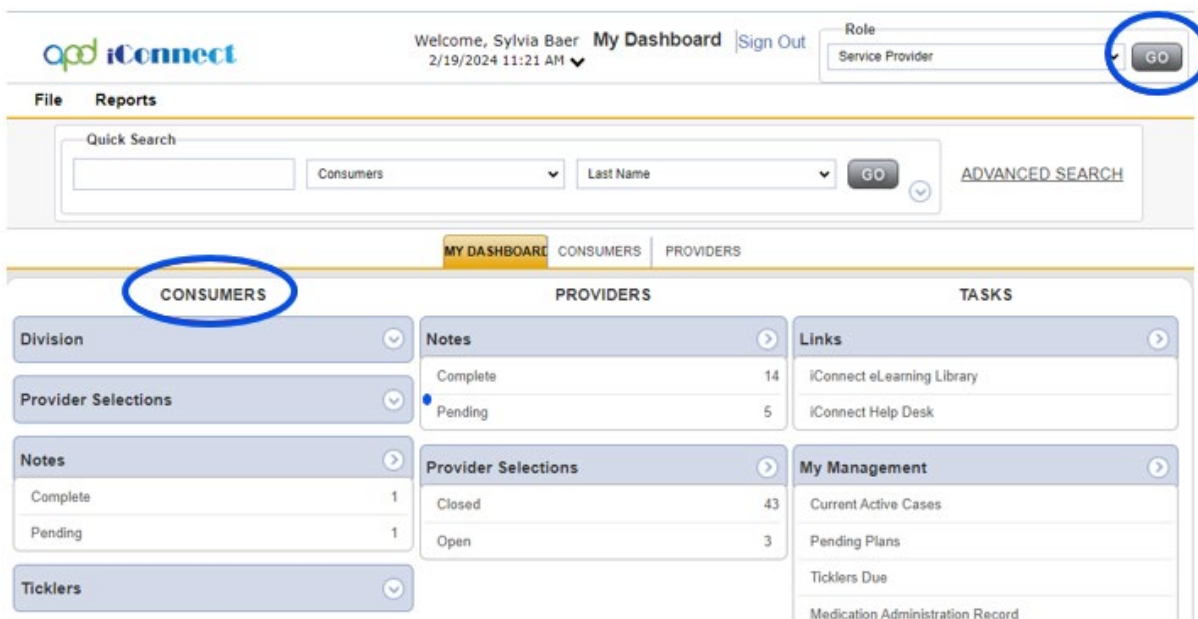
60 Providers Notes record(s) returned - now viewing 1 through 15

Note Date	Note Type	Note Sub-Type	Description	Status	Date Completed	Attachment	Note By
02/19/2024	Expansion Intake	Signed MWSA		Complete	02/19/2024	No	Baer, Sylvia

### Note Locations in iConnect – Consumer Record

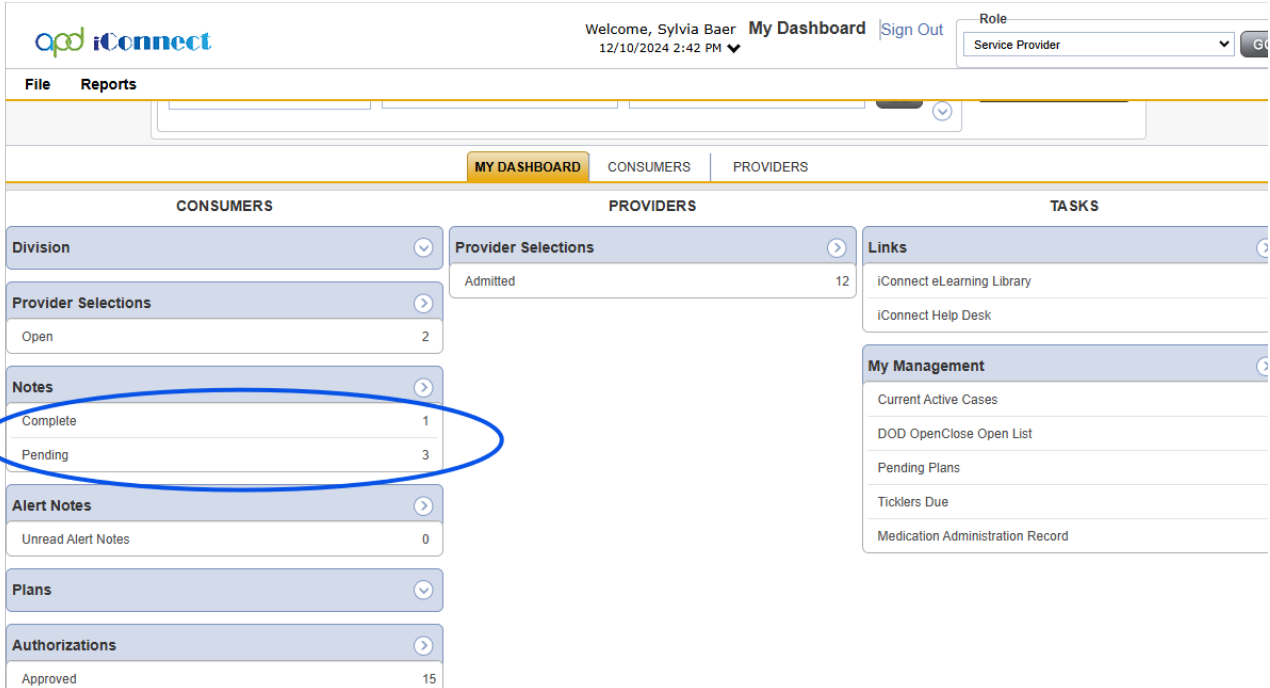
Your Role in iConnect will determine your access. Service Provider, WSC, Service Provider Worker and Provider EVV Manager will have access to the Consumer's Notes.

1. To begin, log into iConnect and set Role = **Service Provider, Service Provider Worker, or WSC**. 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.*



The screenshot shows the iConnect My Dashboard interface. At the top, there is a navigation bar with the iConnect logo, user information (Welcome, Sylvia Baer, 2/19/2024 11:21 AM), and a role selection dropdown set to 'Service Provider' with a 'GO' button circled in blue. Below the navigation bar is a search section with a 'Quick Search' field, a dropdown menu set to 'Consumers', and a 'Last Name' field with a 'GO' button. The main dashboard area is divided into three columns: CONSUMERS (circled in blue), PROVIDERS, and TASKS. The CONSUMERS column includes sections for Division, Provider Selections, Notes (with sub-sections for Complete and Pending), and Ticklers. The PROVIDERS column includes sections for Notes (with sub-sections for Complete and Pending) and Provider Selections (with sub-sections for Closed and Open). The TASKS column includes sections for Links (with sub-sections for iConnect eLearning Library and iConnect Help Desk) and My Management (with sub-sections for Current Active Cases, Pending Plans, Ticklers Due, and Medication Administration Record).

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



Welcome, Sylvia Baer My Dashboard Sign Out Role: Service Provider

File Reports

MY DASHBOARD CONSUMERS PROVIDERS

**CONSUMERS**

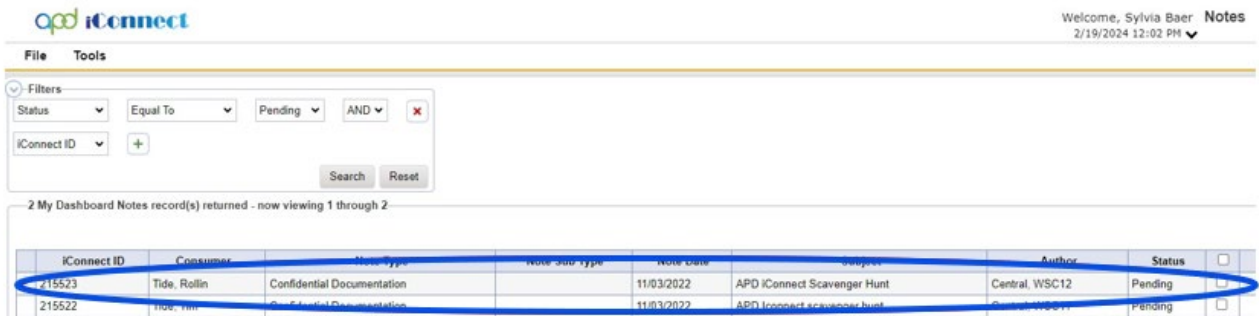
- Division
- Provider Selections
  - Admitted 12
  - Open 2
- Notes
  - Complete 1
  - Pending 3
- Alert Notes
  - Unread Alert Notes 0
- Plans
- Authorizations
  - Approved 15

**PROVIDERS**

**TASKS**

- Links
  - iConnect eLearning Library
  - iConnect Help Desk
- My Management
  - Current Active Cases
  - DOD OpenClose Open List
  - Pending Plans
  - Ticklers Due
  - Medication Administration Record

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



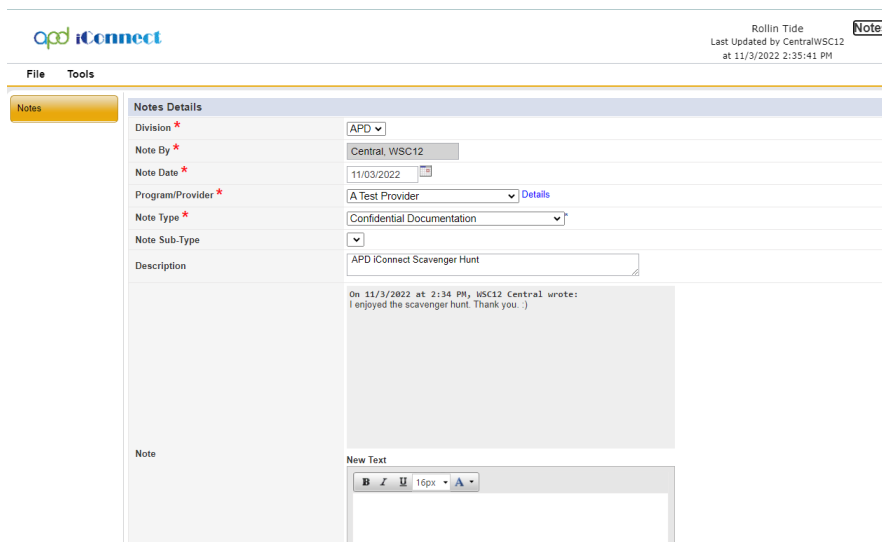
Welcome, Sylvia Baer Notes 2/19/2024 12:02 PM

File Tools

Filters: Status Equal To Pending AND IConnect ID

2 My Dashboard Notes record(s) returned - now viewing 1 through 2

iConnect ID	Consumer	Note Type	Note Sub-Type	Note Date	Subject	Author	Status
215523	Tide, Rollin	Confidential Documentation		11/03/2022	APD iConnect Scavenger Hunt	Central, WSC12	Pending
215522	Tide, Rollin	Confidential Documentation		11/03/2022	APD iConnect Scavenger Hunt	Central, WSC12	Pending



Rollin Tide Notes
   
 Last Updated by CentralWSC12 at 11/3/2022 2:35:41 PM

File Tools

**Notes**

**Notes Details**

- Division: APD
- Note By: Central, WSC12
- Note Date: 11/03/2022
- Program/Provider: A Test Provider
- Note Type: Confidential Documentation
- Note Sub-Type: [Dropdown]
- Description: APD iConnect Scavenger Hunt

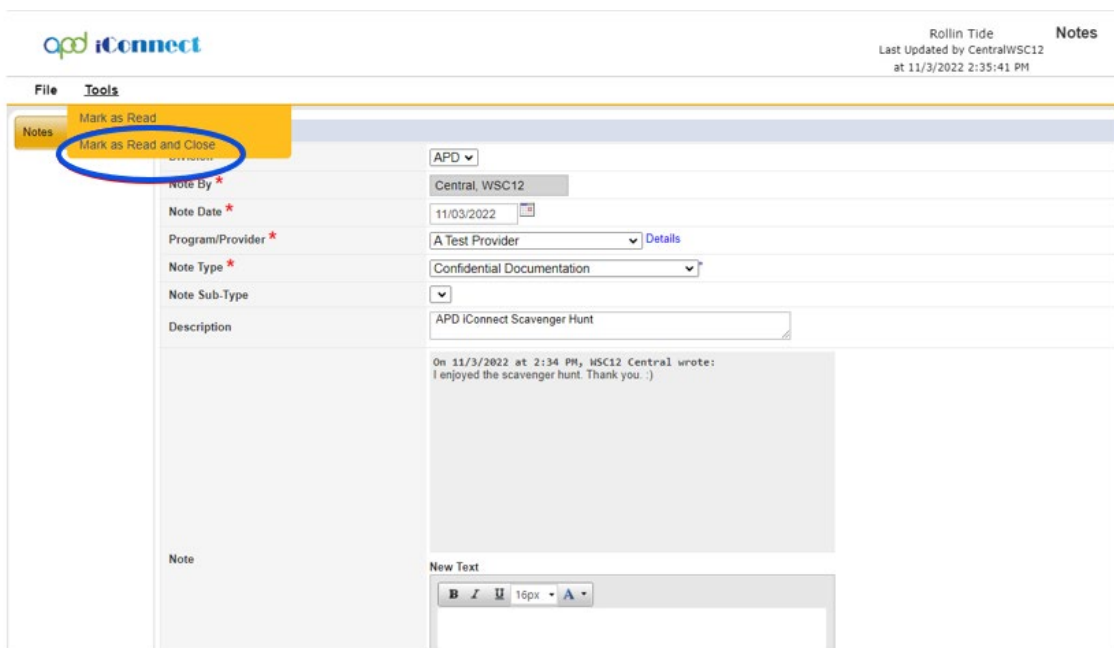
On 11/3/2022 at 2:34 PM, WSC12 Central wrote:  
 I enjoyed the scavenger hunt. Thank you. :)

Note: [Text Area]

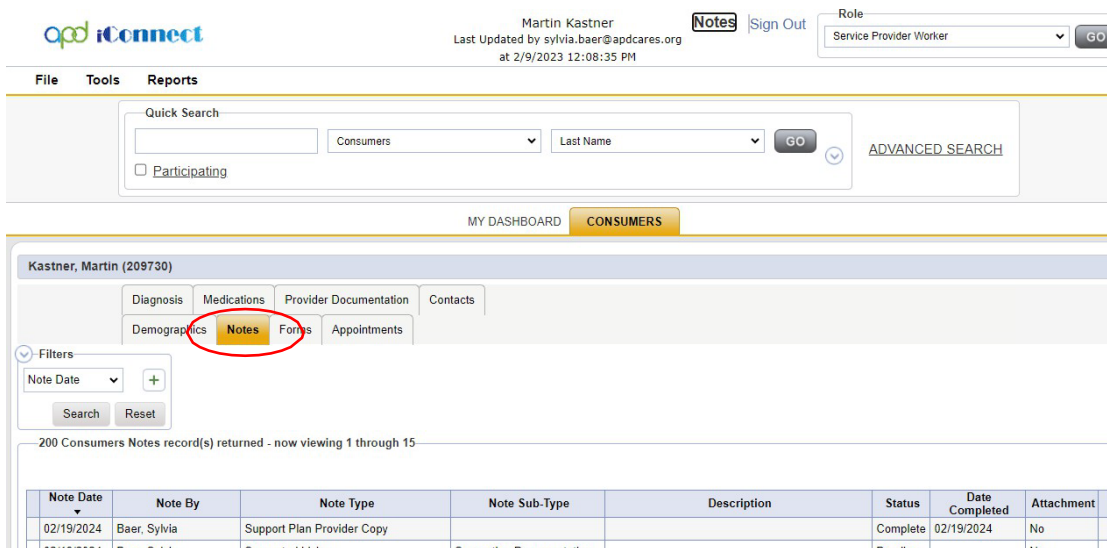
New Text: [Rich Text Editor]

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

- 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.*



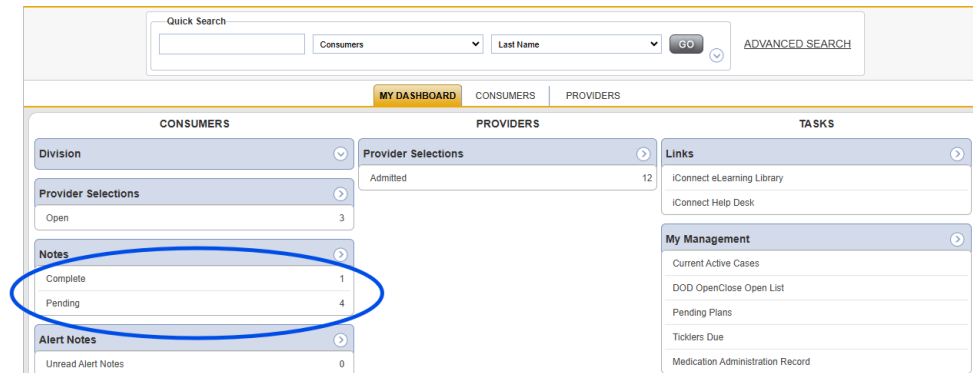
To locate a Note from the Consumer Record marked as Read, navigate to the **Consumer Record > Notes** tab to view any previously Read Notes. This will **NOT** work with Support Plan or Support Plan Provider Copy Note Types.



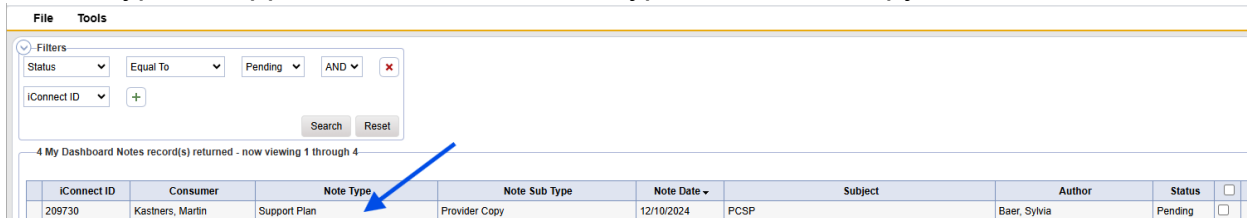
**NEW: Note Locations in iConnect – Consumer Record – Support Plan Note**

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.

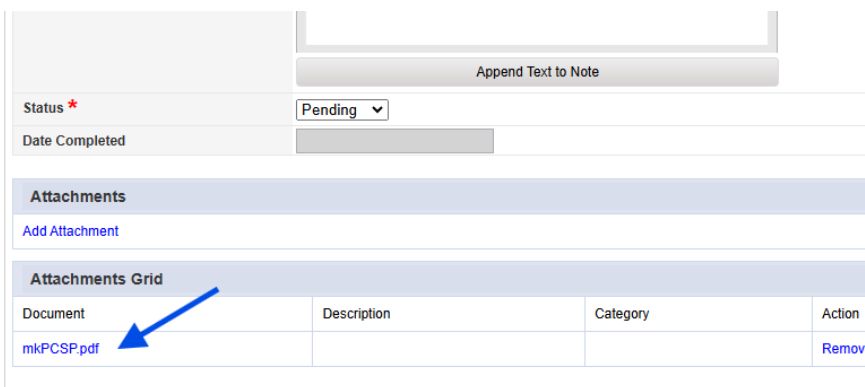
1. Providers will monitor their My Dashboard to view any Pending or Complete Notes.



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.

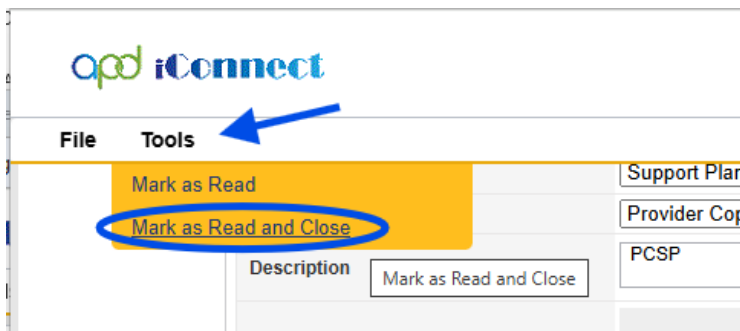


*REMINDER: Personal Health Information (PHI) will be included when downloading the PCSP. It is the responsibility of all iConnect users to ensure that their systems follow all HIPAA requirements.*



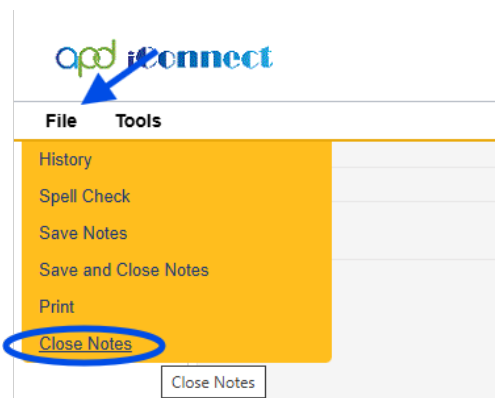
4. The Note will then be closed out. No additional updates should be made to the Note. Do not change the status of the Note.
  - a. If the PCSP is downloaded, the user will be able to go to **Tools > Mark as Read and Close**

*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**



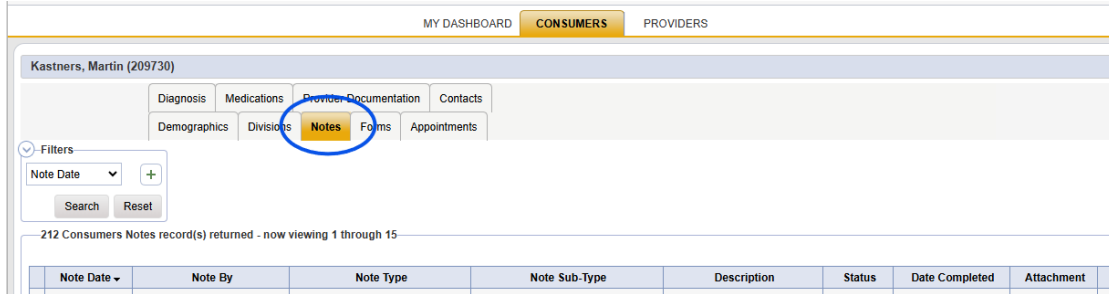
### Creating a Note in iConnect

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.

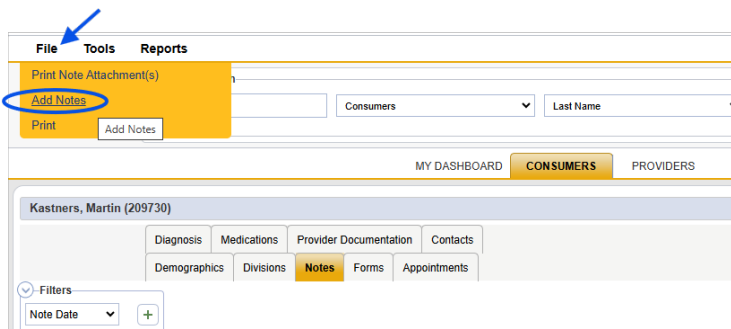
**NEW: Uploading Attachments and Adding Note Recipients**

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**



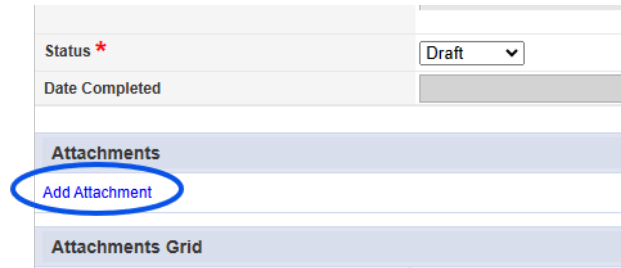
3. Fill out the fields as it pertains to the corresponding workflow.

The screenshot shows the 'Notes Details' form. The fields and their values are as follows:

- Division: APD
- Note By: Baer, Sylvia
- Note Date: 12/10/2024
- Program/Provider: (empty)
- Note Type: (empty)
- Note Sub-Type: (empty)
- Description: (empty)
- Note: (empty text area)
- Status: Draft
- Date Completed: (empty)

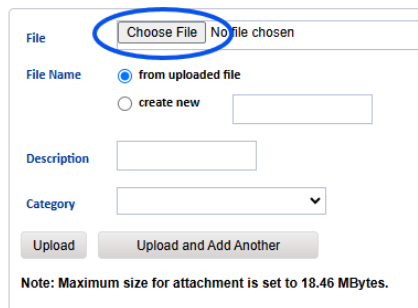
Blue arrows point to the following fields: Program/Provider, Note Type, Note Sub-Type, Description, Note, and Status.

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



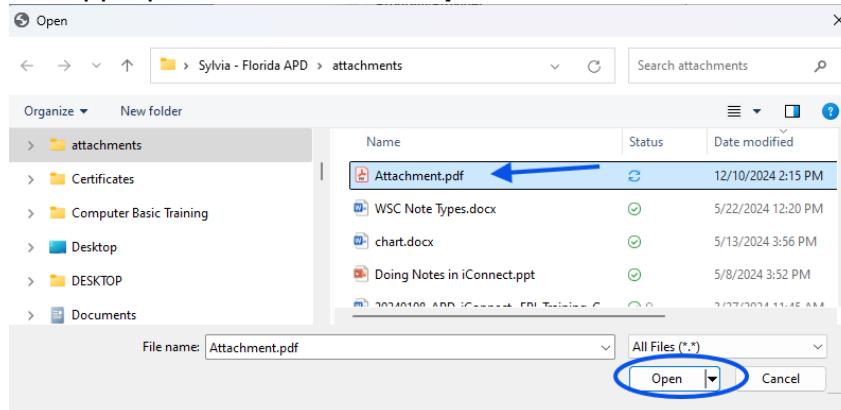
Status \* Draft ▼  
 Date Completed   
**Attachments**  
Add Attachment  
**Attachments Grid**

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



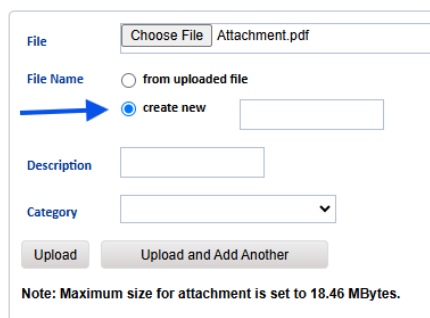
File Choose File No file chosen  
 File Name  from uploaded file  
                    create new   
 Description   
 Category   
 Upload    Upload and Add Another  
 Note: Maximum size for attachment is set to 18.46 MBytes.

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



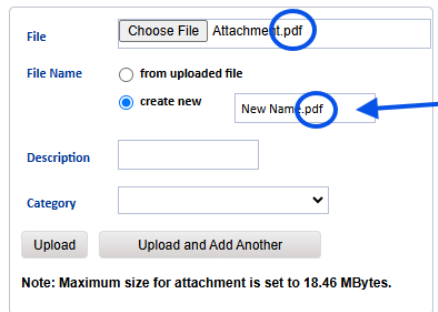
7. **PRO TIP:** The user can create a new name for the attachment to make the attachment easier to identify.

a. Click the **create new** radio button



File Choose File Attachment.pdf  
 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.

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



File: Choose File Attachment.t.pdf

File Name:
   
 from uploaded file
   
 create new
   
 New Name.pdf

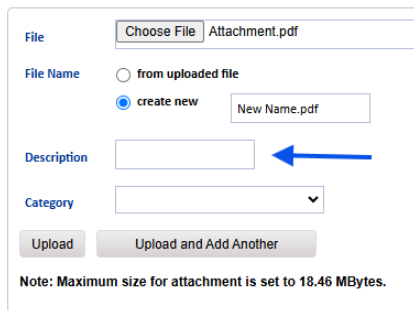
Description:

Category:

Upload Upload and Add Another

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

- c. Add a description if needed.



File: Choose File Attachment.pdf

File Name:
   
 from uploaded file
   
 create new
   
 New Name.pdf

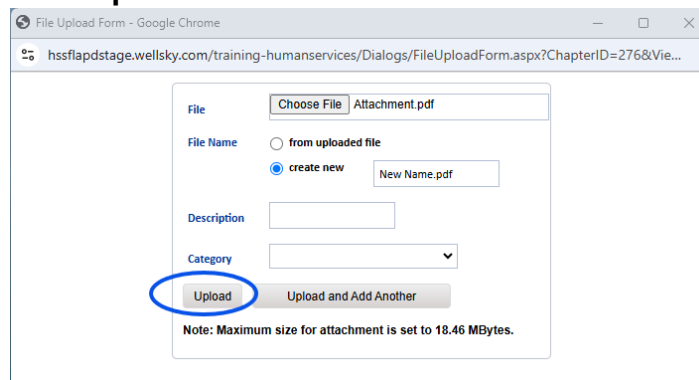
Description:

Category:

Upload Upload and Add Another

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

- d. Click **Upload**



File Upload Form - Google Chrome

hssflapdstage.wellsky.com/training-humanservices/Dialogs/FileUploadForm.aspx?ChapterID=276&Vie...

File: Choose File Attachment.pdf

File Name:
   
 from uploaded file
   
 create new
   
 New Name.pdf

Description:

Category:

Upload Upload and Add Another

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

**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

Attachments Grid		
Document	Description	Category
New Name.pdf		


Note Recipients	
Add Note Recipient:	<input type="text"/> <input type="button" value="Lookup"/> <input type="button" value="Clear"/>


  

Note Recipients Grid			
Name	Date Sent	Date Read	Status

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

**Worker Search Popup**

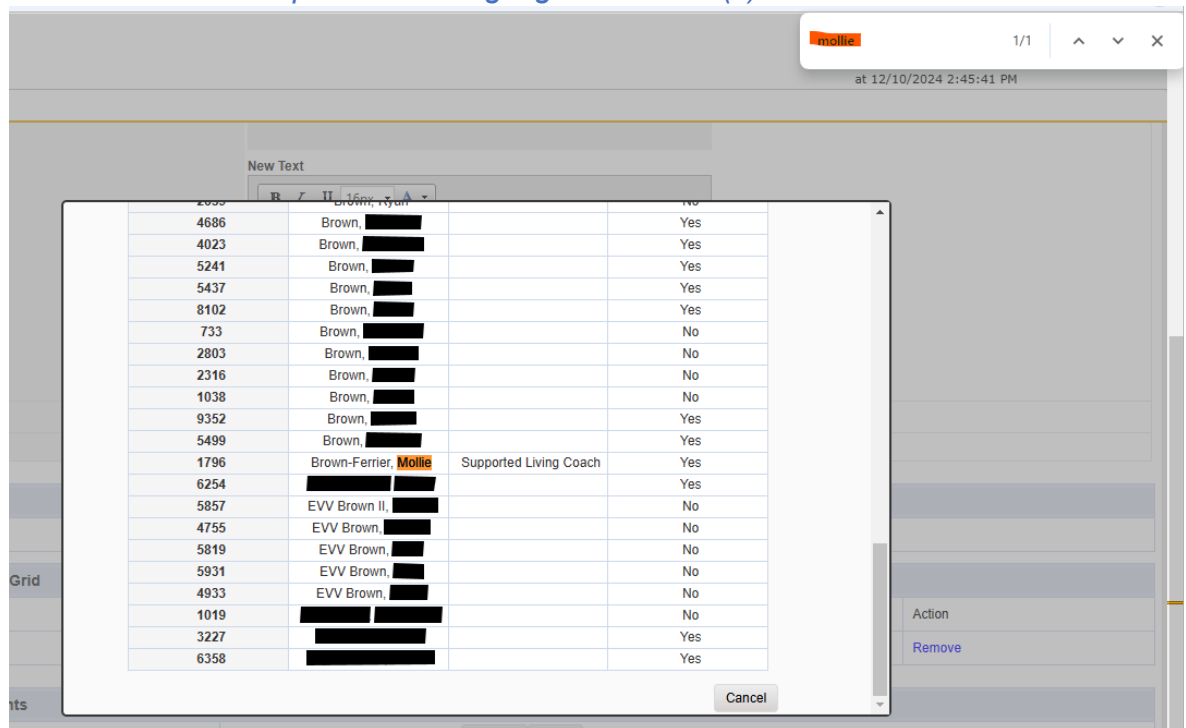
Search by: Last Name ▾ Search Text:  

Search 

2 record(s) returned

MEMBER ID	Worker	Title	User ID Active
9487	Baer, Sylvia	Title Here	Yes

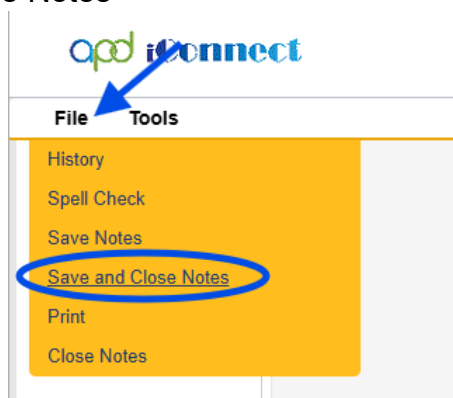
*PRO TIP: Utilize the Ctrl + F keyboard short cut can assist in the search if the Last Name yields several results. Utilizing the keyboard click **Ctrl + F** and type in the first name of the recipient. It will highlight the name(s) in the results.*



at 12/10/2024 2:45:41 PM

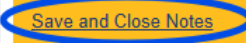
4686	Brown, [REDACTED]		Yes
4023	Brown, [REDACTED]		Yes
5241	Brown, [REDACTED]		Yes
5437	Brown, [REDACTED]		Yes
8102	Brown, [REDACTED]		Yes
733	Brown, [REDACTED]		No
2803	Brown, [REDACTED]		No
2316	Brown, [REDACTED]		No
1038	Brown, [REDACTED]		No
9352	Brown, [REDACTED]		Yes
5499	Brown, [REDACTED]		Yes
1796	Brown-Ferrier, <b>Mollie</b>	Supported Living Coach	Yes
6254	[REDACTED]		Yes
5857	EVV Brown II, [REDACTED]		No
4755	EVV Brown, [REDACTED]		No
5819	EVV Brown, [REDACTED]		No
5931	EVV Brown, [REDACTED]		No
4933	EVV Brown, [REDACTED]		No
1019	[REDACTED]		No
3227	[REDACTED]		Yes
6358	[REDACTED]		Yes

9. Go to File > Save and Close Notes



**apd iConnect**

**File** **Tools**

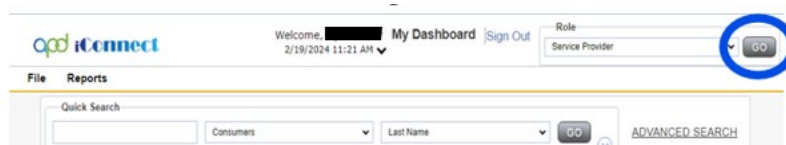
- History
- Spell Check
- Save Notes
- Save and Close Notes** 
- Print
- Close Notes

## Best Practices with Notes in iConnect

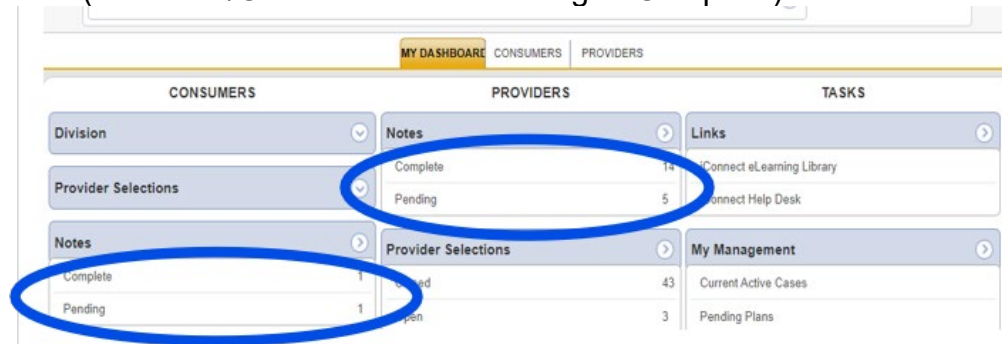
There are some best practices to help ensure that all iConnect users are successful with iConnect.

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.

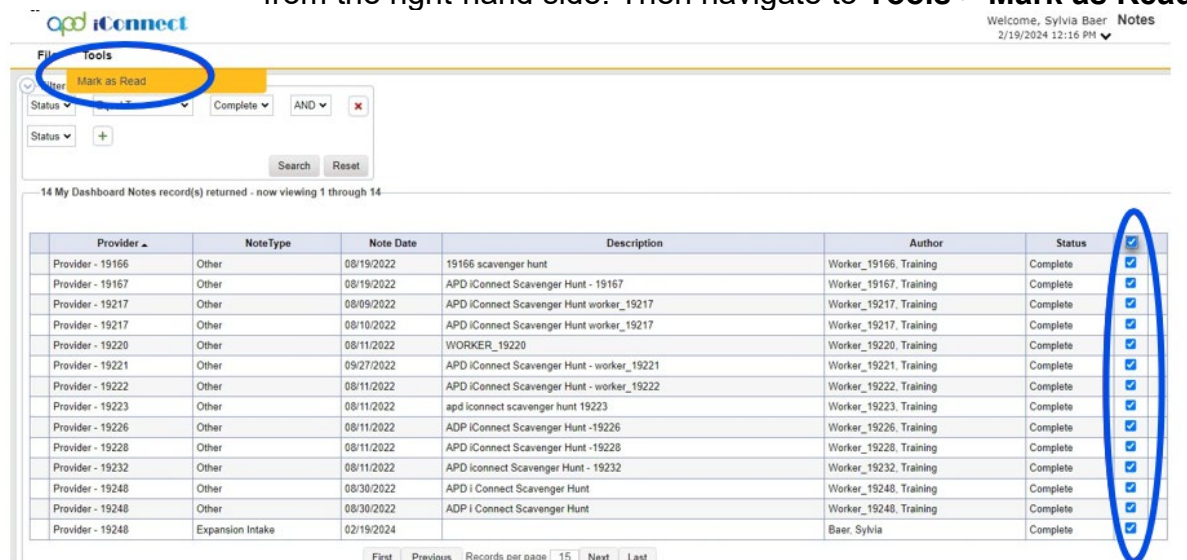
- i. Once logged into iConnect, select your appropriate Role and press **Go**.



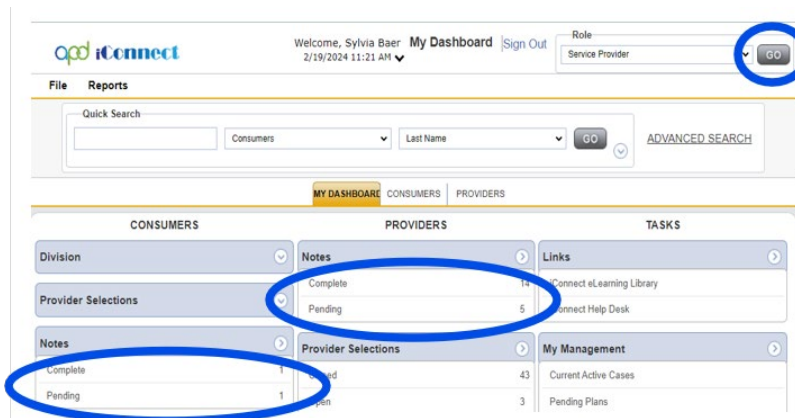
- ii. On your My Dashboard, you will click the Notes you want to view (Providers/Consumers and Pending or Complete).



- 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.

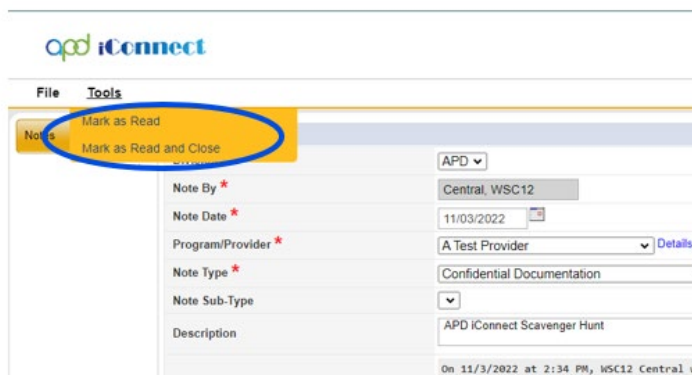
Status  Equal To  Complete  AND  
  
 Status  +

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

Provider	Note Type	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

Records per page: 15

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



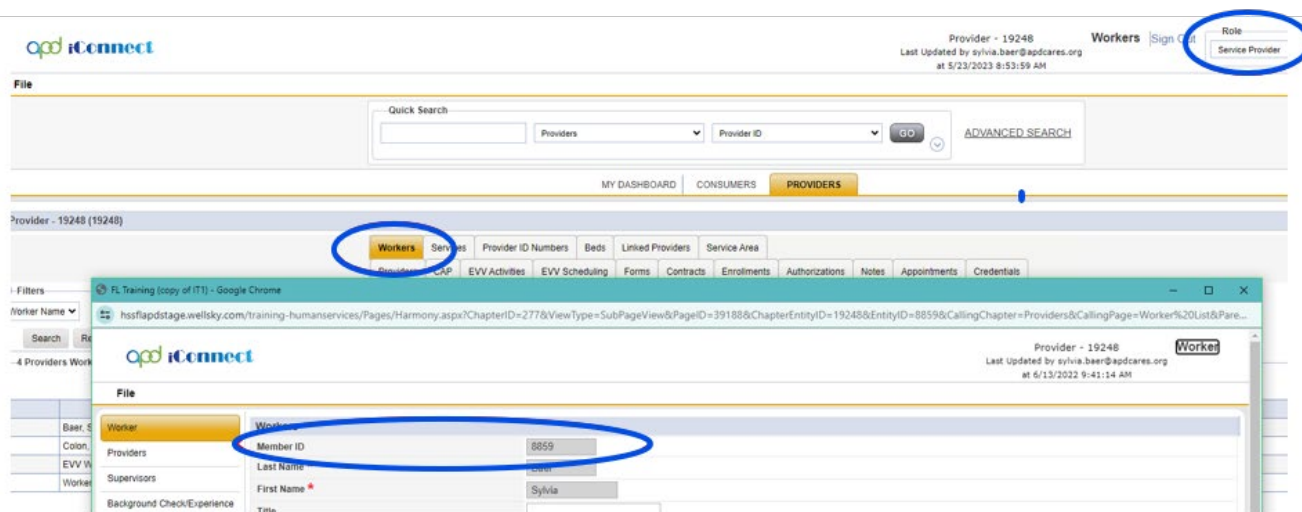
2. Ensure the correct Note Recipient.

- 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 select the Worker's name. The screen will show their Member ID for their agency. (Workers will have a different Member ID for each Agency they work for.)

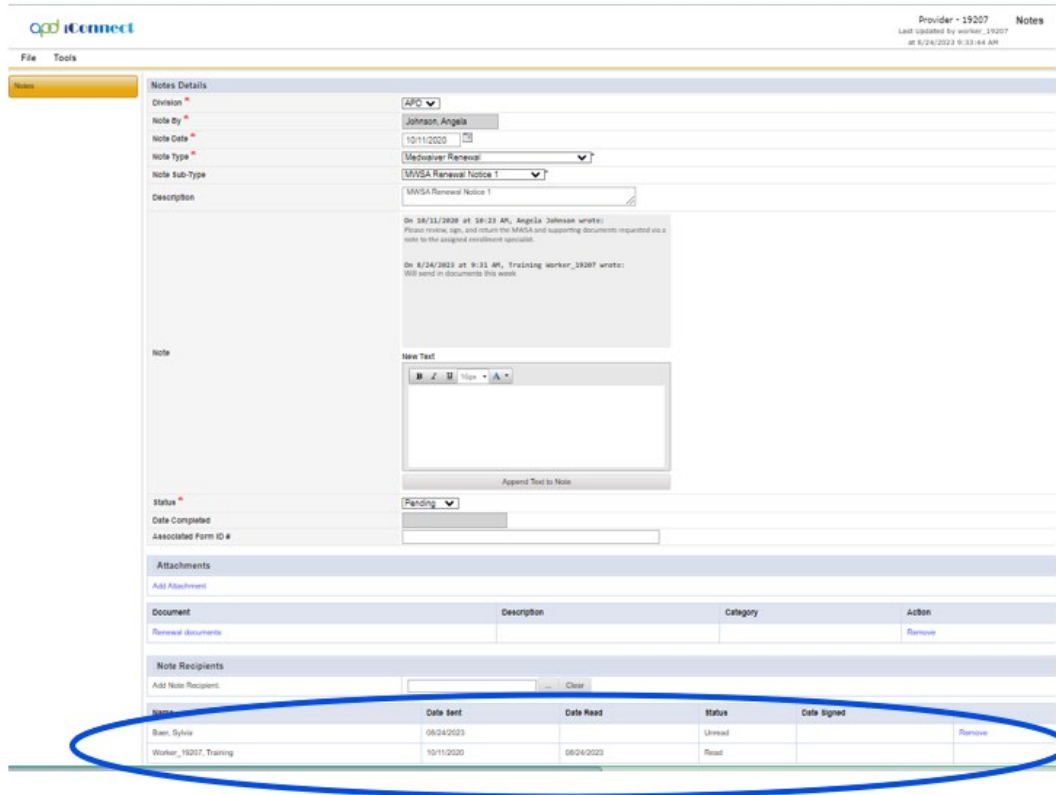
*PRO TIP: The Service Provider (Owner) can edit the title for their employee in order to ensure that the worker can be easily identified as an employee for their organization.*



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.





Provider - 19207 Notes  
 Last updated by worker\_19207 at 8/24/2023 9:33:44 AM

**Notes**

**Notes Details**  
 Division: APD  
 Note By: Johnson, Angela  
 Note Date: 10/11/2020  
 Note Type: Medication Renewal  
 Note Sub-Type: MWBA Renewal Notice 1  
 Description:

On 08/13/2023 at 08:23 AM, Angela Johnson wrote:  
 Please review, sign, and return the MWBA and supporting documents requested and a note to the assigned enrollment specialist.

On 8/24/2023 at 9:33 AM, Training worker\_19207 wrote:  
 Will send in documents this week.

**Note**  
 Show Text  
 Append Text to Note

Status: Pending  
 Date Completed:   
 Associated Form ID #:

**Attachments**  
 Add Attachment

Document	Description	Category	Action
Renewal documents			Remove

**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		

**Note Recipients**  
 Add Note Recipient:  ... Clear

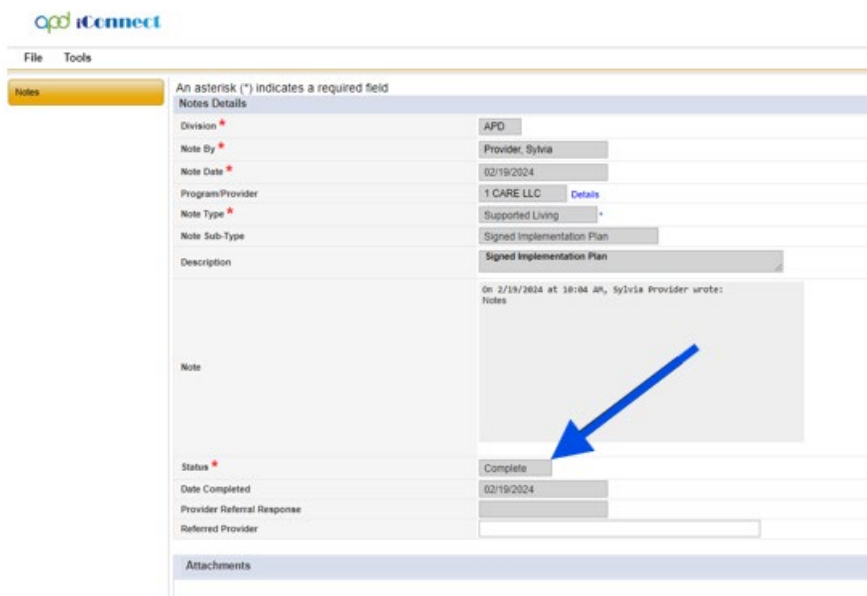
Name	Date Sent	Date Read	Status	Date Signed	
Baer, Sylvia	08/24/2023		Unread		Remove
Worker_19207, Training	10/11/2020	08/24/2023	Read		

- 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.

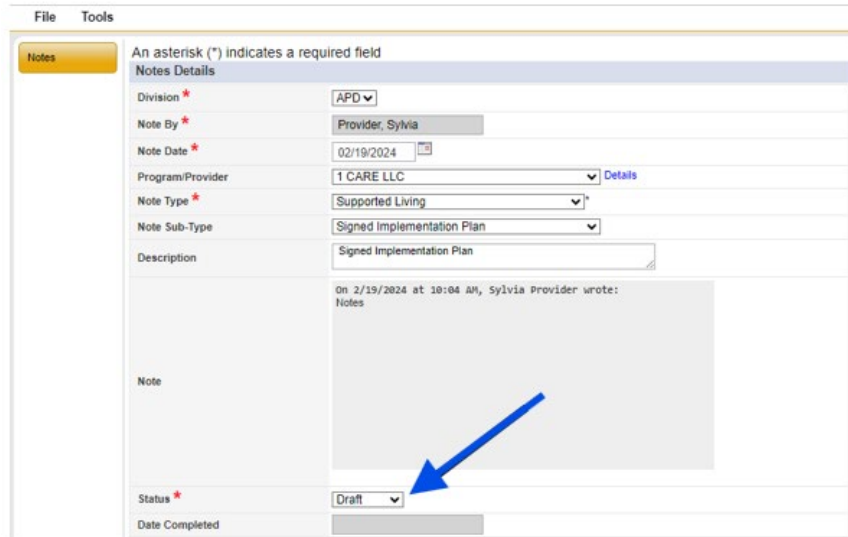


The screenshot shows the 'Notes' form in the iConnect system. The form includes a 'Notes Details' section with the following fields:

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

At the bottom of the form is an 'Attachments' section. A blue arrow points to the 'Complete' status field.

- 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.



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

Note Type \* Supported Living

Note Sub-Type Signed Implementation Plan

Description Signed Implementation Plan

Note

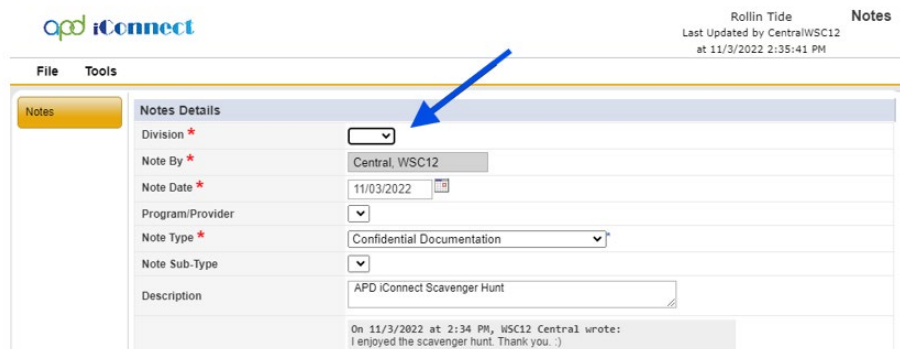
On 2/19/2024 at 10:04 AM, Sylvia Provider wrote:  
Notes

Status \* Draft

Date Completed

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.



APD iConnect

Rollin Tide  
Last Updated by CentralWSC12  
at 11/3/2022 2:35:41 PM

Notes

File Tools

Notes

Notes Details

Division \* [Empty]

Note By \* Central, WSC12

Note Date \* 11/03/2022

Program/Provider [Empty]

Note Type \* Confidential Documentation

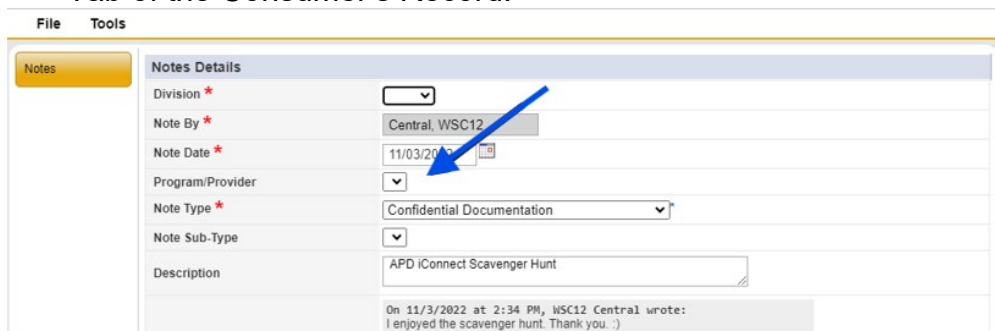
Note Sub-Type [Empty]

Description APD iConnect Scavenger Hunt

Note

On 11/3/2022 at 2:34 PM, WSC12 Central wrote:  
I enjoyed the scavenger hunt. Thank you. :)

- 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.



File Tools

Notes

Notes Details

Division \* [Empty]

Note By \* Central, WSC12

Note Date \* 11/03/2022

Program/Provider [Empty]

Note Type \* Confidential Documentation

Note Sub-Type [Empty]

Description APD iConnect Scavenger Hunt

Note

On 11/3/2022 at 2:34 PM, WSC12 Central wrote:  
I enjoyed the scavenger hunt. Thank you. :)