

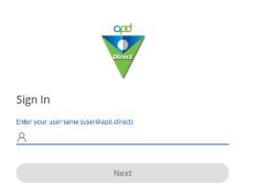
STEP-BY-STEP – ID PASS

APD uses an identity verification process to verify an individual's identity before granting access to APD Information Systems. APD needs some key identifiers such as name, date of birth, and residential address, to uniquely identify an individual and facilitate the identity verification process. APD also implements various technical safeguards to control access to its Information Systems. APD needs some additional information such as phone numbers and unique email addresses to facilitate these technical safeguards. This system implements identity verification and technical safeguards for creating and managing system access accounts.

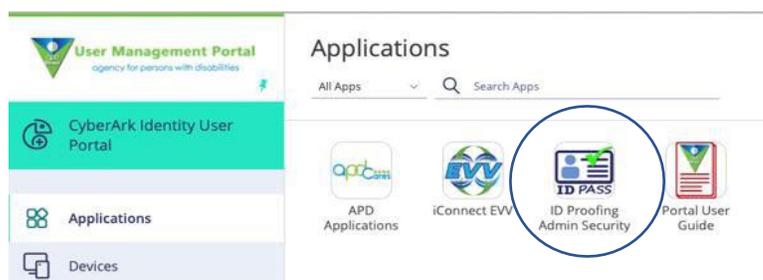
Agency Owners are responsible for requesting access for their employees via their ID PASS account, once established.

With ID PASS, agency owners can request access for their employees. When requesting access agency owners will indicate what role the employee needs and specify whether the employee will need access to the APD iConnect system and the EVV (Electronic Visit Verification) mobile site, or both.

In order to access your ID PASS account, login to APD Direct at <https://apddirect.my.idaptive.app/my> and enter in your username, password, and multifactor identification.



This will open the User Management Portal where you will access your ID PASS account by **Clicking on the ID Proofing Admin Security** icon.



IMPORTANT: Providers must ***not*** create UARs for their employees using apostrophes in the name as it creates issues with the employee's ability to login, and the ability for the user to access RTF fields on notes and forms.

The following is a step-by-step guide for: [adding a business employee](#), [adding a business agent](#), [managing account requests](#), [managing account holders](#) and [employee process becoming active in APD iConnect](#).

ADDING A BUSINESS AGENT

In ID PASS, an Agency Owner can delegate another employee to register workers by putting that employee in the ID PASS Business Agent role. The ID PASS Business Agent role allows entry of User Account Requests into ID PASS for the business' employees and allows the Business Agent to specify the appropriate APD iConnect roles for the employees. (*The Business Agent will not be able to edit any Business Agent or Business (Agency) Owner accounts. The Agency Owner is the only entity that can edit Business Agent. **Only APD can edit Business Owner accounts.***)

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The person(s) added as Business Agent should have either participated in region sponsored APD iConnect training or completed all APD iConnect trainings in TRAIN Florida prior to being designated as the business agent.

TO ADD NEW EMPLOYEE AS BUSINESS AGENT

1. In the Site Navigation menu (located on the left of the screen), **Select Add Business Agent** under New Account Request



2. **Enter employee information** on Basic Info screen (*Remember: you are verifying this employee's identity by adding the employee's information, specifically the date of birth and unique email address.*)

- a. **IMPORTANT: Do not create UARs for employees using apostrophes in the name.**

3. When finished entering employee information, **Click Next**

A screenshot of the 'Business Agent Information' form. The form has tabs for 'Basic Info', 'Residential Address', 'Roles', and 'Review and Submit'. The 'Basic Info' tab is active. The form fields are: First Name (John), Middle Name, Last Name (Office Manager), Date of Birth (07/20/1979), Email (john.peter@ama1@ama1.com), Confirm Email (john.peter@ama1@ama1.com), and Phone (561.555.1212). There is a 'Next' button at the bottom right.

4. **Enter employee's residential address** on Residential Address screen (*The residential address is required because it is used with the identity verification process.*)

5. When finished entering employee's residential address, **Click Next**

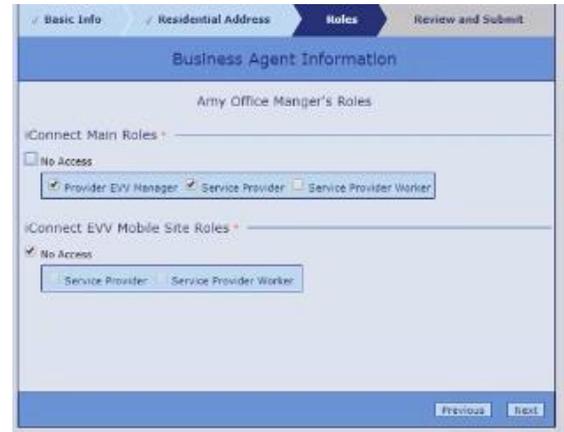
A screenshot of the 'Residential Address' form. The form has tabs for 'Basic Info', 'Residential Address', 'Roles', and 'Review and Submit'. The 'Residential Address' tab is active. The form fields are: Address Line 1 (223 Home St), Address Line 2, City (Tampa), State (Florida (FL)), and Zip (33602). There are 'Previous' and 'Next' buttons at the bottom.

6. **Select Roles for employee** on the Roles screen

- a. **Choose iConnect Main Roles and/or iConnect EVV Mobile Site Roles** (*Remember: Only assign roles the employee needs to complete their job duties.*)
 - i. iConnect Main Roles

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1. **No Access** – employee does not have access to iConnect
2. **Provider EVV Manager** – employee can schedule EVV primary workers and review EVV activities
3. **Service Provider** – employee has access to agency owner’s provider record in iConnect
4. **Service Provider Worker** – employee has access to consumers’ records where the employee has been assigned as primary worker



- ii. iConnect EVV Mobile Site Roles
 1. **No Access** – employee does not have access to iConnect EVV mobile site
 2. **Service Provider** – employee has access to the agency owner’s provider record in iConnect EVV mobile site
 3. **Service Provider Worker** – employee has access to iConnect EVV mobile site

7. When finished selecting roles, **Click Next**

8. Finally, **Review** and **Click Submit** under Review and Submit screen



9. You will receive a **Confirmation** pop-up box that notifies you that adding the Business Agent was successful

- a. Once the request is submitted, an auto-generated email is sent to the employee to create their user account or Register (*For specific information on employee steps to registering, see [Process of Becoming Active in APD iConnect](#)*)
- b. You can now add another Business Agent or Business Employee if you wish to do so



To change an existing business employee to a business agent, please see [Manage Account Holders](#)

STEP-BY-STEP – ID PASS

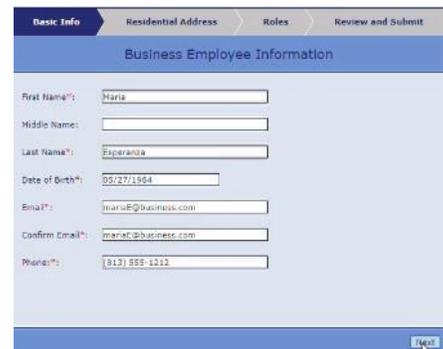
ADDING A BUSINESS EMPLOYEE

1. In the Site Navigation menu (located on the left of the screen), **Select Add Business Employee** under New Account Request



2. **Enter employee information** on Basic Info screen *(Remember: you are verifying this employee's identity by adding the employee's information, specifically the birthdate and unique email address.)*

- a. **IMPORTANT: Do not create UARs for employees using apostrophes in the name.**

A screenshot of the 'Business Employee Information' form. The form has a blue header with the title 'Business Employee Information'. Below the header are several input fields: 'First Name*' (filled with 'Maria'), 'Middle Name*', 'Last Name*' (filled with 'Esperanza'), 'Date of Birth*' (filled with '05/27/1964'), 'Email*' (filled with 'mariaE@business.com'), 'Confirm Email*' (filled with 'mariaE@business.com'), and 'Phone*' (filled with '(813) 555-1212'). There is a 'Next' button at the bottom right.

3. When finished entering employee information, **Click Next**
4. **Enter employee's residential address** on Residential Address screen *(The residential address is required because it is used with the identity verification process.)*
5. When finished entering employee's residential address, **Click Next**

A screenshot of the 'Residential Address' form. The form has a blue header with the title 'Business Employee Information'. Below the header are several input fields: 'Address Line 1*', 'Address Line 2*', 'City*', 'State*' (a dropdown menu showing 'Florida (FL)'), and 'Zip*'. There are 'Previous' and 'Next' buttons at the bottom.

6. **Select Roles for employee** on the Roles screen
 - a. **Choose iConnect Main Roles and/or iConnect EVV Mobile Site Roles** *(Remember: Only assign roles the employee needs to complete their job duties.)*

- i. iConnect Main Roles

1. **No Access** – employee does not have access to iConnect
2. **Provider EVV Manager** – employee can schedule EVV primary workers and review EVV activities
3. **Service Provider** – employee has access to agency owner's provider record in iConnect

A screenshot of the 'Roles' screen. The form has a blue header with the title 'Business Employee Information'. Below the header is the sub-header 'Maria Esperanza's Roles'. There are two sections: 'iConnect Main Roles' and 'iConnect EVV Mobile Site Roles'. Each section has a 'No Access' checkbox and a 'Service Provider Worker' checkbox. The 'Service Provider' checkbox is also present in the 'iConnect Main Roles' section. There are 'Previous' and 'Next' buttons at the bottom.

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4. **Service Provider Worker** – employee has access to consumers' records where the employee has been assigned as primary worker
- ii. iConnect EVV Mobile Site Roles
 1. **No Access** – employee does not have access to iConnect EVV mobile site
 2. **Service Provider Worker** – employee has access to iConnect EVV mobile site

7. When finished selecting roles, **Click Next**

8. Finally, **Review** and **Click Submit** under Review and Submit screen



The screenshot shows a web interface with a navigation bar at the top containing four tabs: 'Basic Info', 'Residential Address', 'Roles', and 'Review and Submit'. The 'Review and Submit' tab is active. Below the navigation bar is a section titled 'Business Employee Information'. The form contains the following fields: Full Name: Maria Esperanza; Date of Birth: 05/27/1964; Email: mariaE@business.com; Phone: (813) 555-1232; Address Line 1: 987 Seaside Harbor Rd; Address Line 2: N/A; City: Tampa; State: Florida (FL); Zip: 33602. Below these fields is a section for 'Selected iConnect EVV Mobile Site Roles' with a radio button selected for 'Service Provider Worker'. At the bottom right of the form are two buttons: 'Previous' and 'Submit'.

9. You will receive a **Confirmation** pop-up box that notifies you that adding the Business Employee was successful

- a. Once the request is submitted, an auto-generated email is sent to the employee to create their user account or Register (*For specific information on employee steps to registering, see [Process of Becoming Active in APD iConnect](#)*)
- b. You could add another Business Agent or Business Employee if you had others to enter



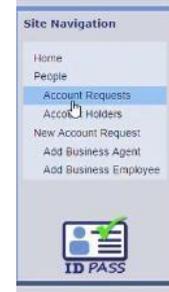
The screenshot shows a 'Confirmation' pop-up box with a light blue background. The title 'Confirmation' is centered at the top. Below the title, the text reads: 'The user account request for the employee has been successfully submitted to APD for processing.' followed by 'The account requester will receive an email with further instructions. Please contact iConnect help desk if you need further assistance.' At the bottom right of the box are two buttons: 'Add Business Agent' and 'Add another Business Employee'.

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MANAGING ACCOUNT REQUESTS

The **Account Requests** area will allow you to manage the different accounts you have requested. You can **edit account request, manage roles, send invitations, and activate/deactivate accounts**.

1. **Select Account Requests** in the Site Navigation menu



2. **Check the employee(s) record** you want to either edit, manage, send, or activate/deactivate

First Name:		Last Name:							
Created On/After:		Date of Birth:							
Updated On/After:		Phone:							
Request Status:		Account requests per page: 10							
<input type="button" value="Search"/> <input type="button" value="Clear"/>									
Account Request		Manage Roles		Send Invitation		Activate/Deactivate			
Account Requesters	IDPASS Role	DOB	Phone	Address	Active Status	Request Status	Business Name	Created On	Updated On
<input type="checkbox"/> John RespiteWorker jworker@tensai.com	Business Employee	6/10/2001	(212) 555-1213	123 Cottage Lane Brandon, FL 33510	Active	Submitted	Johnsons Gates Llc	4/9/2020 4:57:41 PM BOFName BOLName	
<input type="checkbox"/> Amy Office Manager amanager.personal.email@tensai.com	Business Agent	12/21/1978	(555) 555-1213	123 Home St. Tampa, FL 33601	Active	Submitted	Johnsons Gates Llc	4/9/2020 4:59:19 PM BOFName BOLName	
<input checked="" type="checkbox"/> Maria Esperanza maria@business.com	Business Employee	3/27/1964	(813) 555-1212	987 Seaside Harbor Rd Tampa, FL 33602	Active	Link sent by BOFName BOLName on 4/10/2020 8:04:02 AM	Johnsons Gates Llc	4/10/2020 8:04:01 PM BOFName BOLName	4/10/2020 8:04:04 PM BOFName BOLName
<input type="checkbox"/> Mike Walker mwalker@tensai.com	Business Employee	12/15/1964	(813) 555-5555	569 Sunny St Riverview, FL 33568	Deactivated	Link sent by BOFName BOLName on 4/10/2020 7:55:10 PM	Johnsons Gates Llc	4/10/2020 7:55:09 PM BOFName BOLName	4/10/2020 7:55:30 PM BOFName BOLName
<input type="checkbox"/> Stacy Dow stacydow@tensai.com	Business Employee	5/27/1972	(813) 555-1212	123 Home Sweet Home Lane Tampa, FL 33613	Deactivated	Link sent by BOFName BOLName on 4/10/2020 7:34:25 AM	Johnsons Gates Llc	4/10/2020 7:34:24 AM BOFName BOLName	4/10/2020 7:36:22 AM BOFName BOLName
<input type="checkbox"/> BEFName BELName employee@spokane.org	Business Employee	1/1/1968	(360) 346-3464	1234 Test Drive Tallahassee, FL 32311	Deactivated	Link sent by BAFName BALName on 4/2/2020 4:38:43 PM	Johnsons Gates Llc	4/2/2020 4:26:32 PM BAFName BALName	4/2/2020 4:44:54 PM BAFName BALName
<input type="checkbox"/> Jane Doe jane@exampla.com	Business Employee	5/5/1968	(321) 123-1231	123 2nd Street Miami, FL 32346	Active	Link sent by maxine.waters@spptest.fl.local:7 on 6/27/2018 1:23:00 PM	Johnsons Gates Llc	6/27/2018 1:23:28 PM maxine.waters@spptest.fl.local:7	6/27/2018 1:23:30 PM maxine.waters@spptest.fl.local:7
<input type="checkbox"/> Bruce Willis john@exampla.com	Business Employee	1/1/1948	(850) 414-8848	123 Main Street Hollywood, CA 32333	Active	Link sent by maxine.waters@spptest.fl.local:7 on 6/27/2018 1:22:00 PM	Johnsons Gates Llc	6/27/2018 1:22:00 PM maxine.waters@spptest.fl.local:7	6/27/2018 1:22:01 PM maxine.waters@spptest.fl.local:7
<input type="checkbox"/> BEFName BELName employee@spokane.org	Business Employee	1/1/1968	(360) 356-3463	1234 Test Drive Tallahassee, FL 32333	Registered		Johnsons Gates Llc	4/2/2020 4:45:48 PM BAFName BALName	4/2/2020 4:47:58 PM BEFName BELName
<input type="checkbox"/> BAFName BALName businessagent@spokane.org	Business Agent	1/1/1968	(453) 453-4534	1234 Test Drive Tallahassee, FL 32211	Registered		Johnsons Gates Llc	4/1/2020 4:41:55 PM BOFName BOLName	4/2/2020 8:26:57 AM BAFName BALName

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RESEND INVITATION TO EMPLOYEE TO REGISTER

3. **Click Send Invitation**, the employee will receive another auto-generated email and the Request status will be updated with the new Link Sent by person, date, time *(Remember: this is a time sensitive email, and it will expire in five (5) days if the employee does not complete the actions in the email and you will have to resend the invitation. Also, once the employee clicks on the link, he/she must complete the registration process. If the link is opened and the registration process is not completed, the employee **cannot** go back and reopen the link to complete later. This will require a new link is sent.)*

Account Requestors	SOAP# Role	DOB	Phone	Address	Activity Status	Request Status	Business Name	Created On	Updated On
John Sappalottier	Business Employee	4/16/2001	(215) 555-1212	133 Cottage Lane Brandon, FL 33510	Active	Submitted	Johnsons Gates Llc	4/9/2020 4:57:41 PM	
Amy Office Manager	Business Agent	12/21/1978	(555) 555-1212	123 Home St Tampa, FL 33601	Active	Submitted	Johnsons Gates Llc	4/9/2020 4:58:19 PM	
Maria Espinoza	Business Employee	5/27/1964	(813) 555-1212	987 Seaside Harbor Rd Tampa, FL 33602	Active	Link sent by BOFName BOFName on 4/10/2020 8:04:02 PM	Johnsons Gates Llc	4/10/2020 8:04:01 PM	4/10/2020 8:04:04 PM
Mike Walker	Business Employee	12/18/1964	(813) 555-5555	569 Sukey St Suwanee, FL 32088	Deactivated	Link sent by BOFName BOFName on 4/10/2020 7:55:20 PM	Johnsons Gates Llc	4/10/2020 7:55:20 PM	4/10/2020 7:55:30 PM
Stacy Dow	Business Employee	5/27/1972	(813) 555-1212	123 Home Sweet Home Lane Tampa, FL 33601	Deactivated	Link sent by BOFName BOFName on 4/10/2020 7:34:25 AM	Johnsons Gates Llc	4/10/2020 7:34:24 AM	4/10/2020 7:38:22 AM
BOFName BOFName	Business Employee	4/1/1968	(561) 246-2464	1234 Test Drive Tallahassee, FL 32311	Deactivated	Link sent by BOFName BOFName on 4/2/2020 4:38:43 PM	Johnsons Gates Llc	4/2/2020 4:38:33 PM	4/2/2020 4:44:34 PM
John Doe	Business Employee	9/8/1968	(321) 123-1231	123 2nd Street Miami, FL 32146	Active	Link sent by maime waters@apdtest.fl.local.7 on 6/27/2018 1:23:29 PM	Johnsons Gates Llc	6/27/2018 1:23:29 PM	6/27/2018 1:23:30 PM
Bruce Willis	Business Employee	1/1/1945	(850) 414-8848	123 Main Street Hollywood, CA 32333	Active	Link sent by maime waters@apdtest.fl.local.7 on 6/27/2018 1:23:29 PM	Johnsons Gates Llc	6/27/2018 1:23:29 PM	6/27/2018 1:23:31 PM
BOFName BOFName	Business Employee	1/1/1968	(561) 256-2462	1234 Test Drive Tallahassee, FL 32333	Registered		Johnsons Gates Llc	4/2/2020 4:45:48 PM	4/2/2020 4:47:58 PM
BAFName BAFName	Business Agent	1/1/1960	(403) 403-4034	1234 Test Drive Tallahassee, FL 32311	Registered		Johnsons Gates Llc	4/2/2020 4:41:55 PM	4/2/2020 9:26:57 AM

DEACTIVATING AN EMPLOYEE REQUEST

You should deactivate an employee request if it is determined that the employee does not need access to APD iConnect and the EVV Mobile site.

3. **Click Activate/Deactivate**

Account Requestors	SOAP# Role	DOB	Phone	Address	Activity Status	Request Status	Business Name	Created On	Updated On
John Sappalottier	Business Employee	4/16/2001	(215) 555-1212	133 Cottage Lane Brandon, FL 33510	Active	Submitted	Johnsons Gates Llc	4/9/2020 4:57:41 PM	
Amy Office Manager	Business Agent	12/21/1978	(555) 555-1212	123 Home St Tampa, FL 33601	Active	Submitted	Johnsons Gates Llc	4/9/2020 4:58:19 PM	
Maria Espinoza	Business Employee	5/27/1964	(813) 555-1212	987 Seaside Harbor Rd Tampa, FL 33602	Active	Link sent by BOFName BOFName on 4/10/2020 8:04:02 PM	Johnsons Gates Llc	4/10/2020 8:04:01 PM	4/10/2020 8:04:04 PM
Mike Walker	Business Employee	12/18/1964	(813) 555-5555	569 Sukey St Suwanee, FL 32088	Deactivated	Link sent by BOFName BOFName on 4/10/2020 7:55:20 PM	Johnsons Gates Llc	4/10/2020 7:55:20 PM	4/10/2020 7:55:30 PM
Stacy Dow	Business Employee	5/27/1972	(813) 555-1212	123 Home Sweet Home Lane Tampa, FL 33601	Deactivated	Link sent by BOFName BOFName on 4/10/2020 7:34:25 AM	Johnsons Gates Llc	4/10/2020 7:34:24 AM	4/10/2020 7:38:22 AM
BOFName BOFName	Business Employee	4/1/1968	(561) 246-2464	1234 Test Drive Tallahassee, FL 32311	Deactivated	Link sent by BOFName BOFName on 4/2/2020 4:38:43 PM	Johnsons Gates Llc	4/2/2020 4:38:33 PM	4/2/2020 4:44:34 PM
John Doe	Business Employee	9/8/1968	(321) 123-1231	123 2nd Street Miami, FL 32146	Active	Link sent by maime waters@apdtest.fl.local.7 on 6/27/2018 1:23:29 PM	Johnsons Gates Llc	6/27/2018 1:23:29 PM	6/27/2018 1:23:30 PM
Bruce Willis	Business Employee	1/1/1945	(850) 414-8848	123 Main Street Hollywood, CA 32333	Active	Link sent by maime waters@apdtest.fl.local.7 on 6/27/2018 1:23:29 PM	Johnsons Gates Llc	6/27/2018 1:23:29 PM	6/27/2018 1:23:31 PM
BOFName BOFName	Business Employee	1/1/1968	(561) 256-2462	1234 Test Drive Tallahassee, FL 32333	Registered		Johnsons Gates Llc	4/2/2020 4:45:48 PM	4/2/2020 4:47:58 PM
BAFName BAFName	Business Agent	1/1/1960	(403) 403-4034	1234 Test Drive Tallahassee, FL 32311	Registered		Johnsons Gates Llc	4/2/2020 4:41:55 PM	4/2/2020 9:26:57 AM

4. **Click OK** on the pop-up box asking: “Are you sure you want to deactivate the account request?”



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5. Notice the employee request has been deactivated

First Name: <input type="text"/>		Last Name: <input type="text"/>							
Created On/After: <input type="text"/>		Date of Birth: <input type="text"/>							
Updated On/After: <input type="text"/>		Phone: <input type="text"/>							
Request Status: <input type="text"/>		Email: <input type="text"/>							
Account requests per page: 13									
<input type="button" value="Search"/> <input type="button" value="Clear"/>									
Edit Account Request									
Account Requestors	IDPASS Role	DOB	Phone	Address	Activity Status	Request Status	Business Name	Created On	Updated On
John Reppert/lor	Business Employee	4/10/2001	(313) 555-1212	123 Cottage Lane Bradford, FL 33310	Active	Submitted	Johnsons Gates Ltc	4/9/2020 4:37:41 PM BOName BOName	
Amy Office Manager	Business Agent	12/21/1978	(555) 555-1212	123 Home St. Tampa, FL 33621	Active	Submitted	Johnsons Gates Ltc	4/9/2020 4:50:19 PM BOName BOName	
Maria Espinosa	Business Employee	5/27/1964	(813) 555-1212	987 Seaside Harbor Rd Tampa, FL 33662	Active	Link sent by BOName BOName on 4/10/2020 8:04:02 AM	Johnsons Gates Ltc	4/9/2020 8:04:01 PM BOName BOName	4/10/2020 8:04:04 PM BOName BOName
Mike Walker	Business Employee	12/10/1964	(813) 555-5555	889 Sunny St. Bucarevie, FL 88888	Deactivated	Link sent by BOName BOName on 4/10/2020 7:55:10 PM	Johnsons Gates Ltc	4/9/2020 7:55:09 PM BOName BOName	4/10/2020 7:56:30 PM BOName BOName
Susy Dow	Business Employee	5/27/1972	(813) 555-1212	123 Main Street Tampa, FL 33621	Deactivated	Link sent by BOName BOName on 4/10/2020 7:56:22 AM	Johnsons Gates Ltc	4/9/2020 7:56:24 AM BOName BOName	4/10/2020 7:56:22 AM BOName BOName
BOName BOName	Business Employee	1/1/1968	(354) 344-3444	1234 Test Drive Tallahassee, FL 32311	Deactivated	Link sent by BOName BOName on 4/2/2020 4:38:43 PM	Johnsons Gates Ltc	4/2/2020 4:38:32 PM BAName BAName	4/2/2020 4:41:04 PM BAName BAName
Jane Doe	Business Employee	5/8/1965	(321) 123-1232	123 2nd Street Miami, FL 33346	Deactivated	Link sent by maxine.waters@boctest.Riscoe.T on 6/27/2018 4:23:00 PM	Johnsons Gates Ltc	6/27/2018 1:23:29 PM maxine.waters@boctest.Riscoe.T	4/10/2020 9:00:10 PM BOName BOName
Bruce Willis	Business Employee	1/10/1949	(909) 414-5646	123 Main Street Hollywood, CA 32333	Active	Link sent by maxine.waters@boctest.Riscoe.T on 6/27/2018 4:24:00 PM	Johnsons Gates Ltc	6/27/2018 1:23:00 PM maxine.waters@boctest.Riscoe.T	6/27/2018 1:23:03 PM maxine.waters@boctest.Riscoe.T
BOName BOName	Business Employee	1/1/1968	(564) 356-3466	1234 Test Drive Tallahassee, FL 32311	Registered		Johnsons Gates Ltc	4/2/2020 4:40:48 PM BOName BOName	4/2/2020 4:47:38 PM BOName BOName
BAName BAName	Business Agent	1/1/1968	(532) 403-4032	1234 Test Drive Tallahassee, FL 32311	Registered		Johnsons Gates Ltc	4/10/2020 4:41:05 PM BOName BOName	4/10/2020 8:26:47 AM BAName BAName

MANAGING ROLES FOR EMPLOYEE

3. Select Manage Roles

First Name: <input type="text"/>		Last Name: <input type="text"/>							
Created On/After: <input type="text"/>		Date of Birth: <input type="text"/>							
Updated On/After: <input type="text"/>		Phone: <input type="text"/>							
Request Status: <input type="text"/>		Email: <input type="text"/>							
Account requests per page: 13									
<input type="button" value="Search"/> <input type="button" value="Clear"/>									
Edit Account Request									
Account Requestors	IDPASS Role	DOB	Phone	Address	Activity Status	Request Status	Business Name	Created On	Updated On
John Reppert/lor	Business Employee	4/10/2001	(313) 555-1212	123 Cottage Lane Bradford, FL 33310	Active	Submitted	Johnsons Gates Ltc	4/9/2020 4:37:41 PM BOName BOName	
Amy Office Manager	Business Agent	12/21/1978	(555) 555-1212	123 Home St. Tampa, FL 33621	Active	Submitted	Johnsons Gates Ltc	4/9/2020 4:50:19 PM BOName BOName	
Maria Espinosa	Business Employee	5/27/1964	(813) 555-1212	987 Seaside Harbor Rd Tampa, FL 33662	Active	Link sent by BOName BOName on 4/10/2020 8:04:02 AM	Johnsons Gates Ltc	4/9/2020 8:04:01 PM BOName BOName	4/10/2020 8:04:04 PM BOName BOName
Mike Walker	Business Employee	12/10/1964	(813) 555-5555	889 Sunny St. Bucarevie, FL 88888	Deactivated	Link sent by BOName BOName on 4/10/2020 7:55:10 PM	Johnsons Gates Ltc	4/9/2020 7:55:09 PM BOName BOName	4/10/2020 7:56:30 PM BOName BOName
Susy Dow	Business Employee	5/27/1972	(813) 555-1212	123 Main Street Tampa, FL 33621	Deactivated	Link sent by BOName BOName on 4/10/2020 7:56:22 AM	Johnsons Gates Ltc	4/9/2020 7:56:24 AM BOName BOName	4/10/2020 7:56:22 AM BOName BOName
BOName BOName	Business Employee	1/1/1968	(354) 344-3444	1234 Test Drive Tallahassee, FL 32311	Deactivated	Link sent by BOName BOName on 4/2/2020 4:38:43 PM	Johnsons Gates Ltc	4/2/2020 4:38:32 PM BAName BAName	4/2/2020 4:41:04 PM BAName BAName
Jane Doe	Business Employee	5/8/1965	(321) 123-1232	123 2nd Street Miami, FL 33346	Active	Link sent by maxine.waters@boctest.Riscoe.T on 6/27/2018 4:23:00 PM	Johnsons Gates Ltc	6/27/2018 1:23:29 PM maxine.waters@boctest.Riscoe.T	4/10/2020 9:00:10 PM BOName BOName
Bruce Willis	Business Employee	1/10/1949	(909) 414-5646	123 Main Street Hollywood, CA 32333	Active	Link sent by maxine.waters@boctest.Riscoe.T on 6/27/2018 4:24:00 PM	Johnsons Gates Ltc	6/27/2018 1:23:00 PM maxine.waters@boctest.Riscoe.T	6/27/2018 1:23:03 PM maxine.waters@boctest.Riscoe.T
BOName BOName	Business Employee	1/1/1968	(564) 356-3466	1234 Test Drive Tallahassee, FL 32311	Registered		Johnsons Gates Ltc	4/2/2020 4:40:48 PM BOName BOName	4/2/2020 4:47:38 PM BOName BOName
BAName BAName	Business Agent	1/1/1968	(532) 403-4032	1234 Test Drive Tallahassee, FL 32311	Registered		Johnsons Gates Ltc	4/10/2020 4:41:05 PM BOName BOName	4/10/2020 8:26:47 AM BAName BAName

4. Make changes to employee roles by selecting the appropriate roles

5. Save changes

Identity Proofing Administrative Security System

Edit Account

Login name:
 Business name:

Display Name: Text Messages:
 Email: Phone 1: N/A
 Phone 2: N/A

iConnect EVV Mobile Site Roles
 No Access
 EVV User

iConnect Roles *
 No Access
 Provider EVV Manager Service Provider Service Provider Worker

IDPASS Role
 Name: johnson's current IDPASS role is **Business Employee**.
 Change johnson's IDPASS role to:
 Business Agent
 Business Owner

STEP-BY-STEP – ID PASS

EDIT ACCOUNT REQUEST

If you discovered that the email address for the employee is incorrect, you can edit the account request and manually **Send Invitation**.

3. Select Edit Account Request

The screenshot shows a web interface for editing account requests. At the top, there are input fields for First Name, Last Name, Created On/When, Date of Birth, Updated On/When, Phone, and Email. Below these is a 'Request Status' dropdown menu and a 'Search' button. The main part of the interface is a table with columns: Account Number, Business Name, DOB, Phone, Address, Activity Status, Request Status, Business Name, Created On, and Updated On. The table contains several rows of data, including entries for John Respondek, Amy Office Manager, Maria Escobar, Mike Walker, Tony Dow, BEName BELName, John Dow, Bruce Willis, BEName BELName, and BAName BALName.

4. Make appropriate changes and save, then [Send Invitation](#)

ACCOUNT REQUESTED STATUS EXPLAINED

1. **Submitted** – information has been entered into ID PASS but link has not been sent to employee
2. **Link Sent** – indicates who initiated the auto-generated email and when it was sent, employee needs to act on the instructions within the email within five (5) days
3. **Registered** – employee completed the steps in the auto-generated email (**However, it does NOT mean the employee has logged into APD iConnect at least once**)
 - a. For confirmation, the employee has logged into APD iConnect, check the worker tab in your provider record
 - b. If employee logged into APD iConnect, the name would appear in the Workers tab

The screenshot shows the 'Workers' tab for provider 19147. It includes a search filter for 'Provider Worker Active' set to 'Equal To' and a search for 'Worker Name'. Below the search, it shows '2 Workers record(s) returned - now viewing 1 through 2'. The table below lists the workers:

Worker Name	Title	Phone Number	Active	Provider Worker Active
Worker_19147, Training			True	True
Worker_2, Training	Personal support		True	True

4. **Requested – exclusive to business owners** – indicates the request has been made for the email for registering login credentials
 - a. You won't receive a link to create a user account until you have at least one active service authorization
 - b. The services that trigger the link to be sent are Personal Supports and Respite and will also include Supported Living Coaching after October 25, 2021.
 - c. Once you have a fully approved active service authorization, you will receive an email that contains the link within a week

STEP-BY-STEP – ID PASS

ACCOUNT ACTIVITY STATUS EXPLAINED

1. Active – account is actively working toward registered
2. Deactivated – account is no longer active
3. Area is blank – employee has completed the steps in the auto-generated email (**However, it does not mean the employee has logged into APD iConnect**)

MANAGING ACCOUNT HOLDERS

The Account Holders lists all employees on the Business Owner's account. You can edit accounts or deactivate the account from the Account Holders screen

The screenshot displays the 'Identity Proofing Administrative Security System' interface. The top navigation bar includes the logo for 'apd agency for persons with disabilities State of Florida' and the system title. The main content area is titled 'Account Holders' and features a search form with fields for Name, Created On/After, Date of Birth, Phone, and Email. Below the search form is a table of account holders with columns for Account Holders, Login Name, IDPASS Role, DOB, Phone Numbers, At-Loss, Business Name, and Created On. Two account holders are listed in the table.

Account Holders	Login Name	IDPASS Role	DOB	Phone Numbers	At-Loss	Business Name	Created On
<input type="checkbox"/> Select All							
<input type="checkbox"/> B@Name B@Name employee@apdconnect.org	b@name.b@name	Business Employee	1/1/1988	Text: (266) 748-5780 Phone 1: N/A Phone 2: N/A	<input checked="" type="checkbox"/>	Johnsons Gates Lic	4/2/2020
<input checked="" type="checkbox"/> B@Name B@Name businessagent@apdconnect.org	b@name.b@name	Business Agent	1/1/1988	Text: (386) 748-5780 Phone 1: N/A Phone 2: N/A	<input checked="" type="checkbox"/>	Johnsons Gates Lic	4/2/2020

STEP-BY-STEP – ID PASS

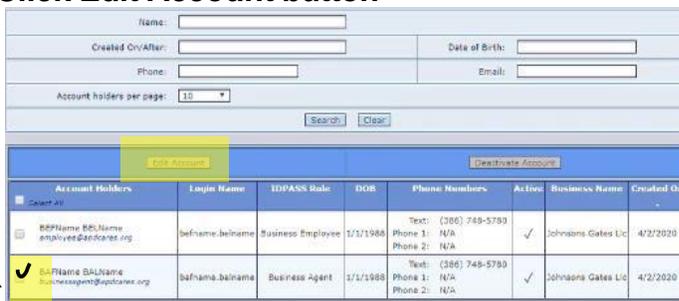
TO CHANGE AN EMPLOYEE TO BUSINESS AGENT

1. **Select Account Holder** from Site Navigation menu



2. **Check the employee** you want to edit

3. **Click Edit Account** button

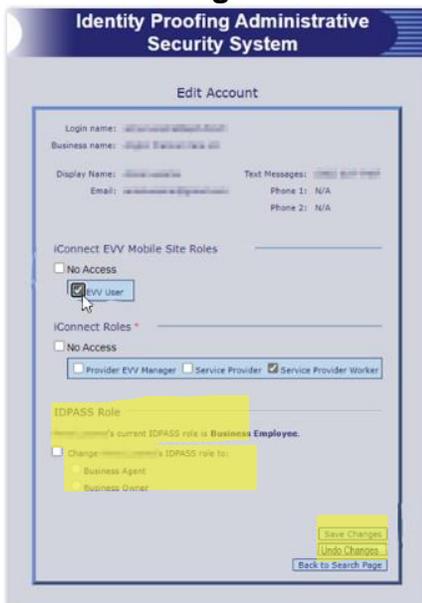


The screenshot shows a search interface for account holders. It includes input fields for Name, Created On/After, Date of Birth, Phone, and Email. A dropdown menu for 'Account holders per page' is set to 10. Below the search fields are 'Search' and 'Clear' buttons. A table of account holders is displayed with columns: Account Holders, Login Name, IDPASS Role, DOB, Phone Numbers, Active, Business Name, and Created On. Two rows are visible, both for 'Johnsons Gates Lic'. The second row is highlighted in yellow, indicating it is selected for editing.

Account Holders	Login Name	IDPASS Role	DOB	Phone Numbers	Active	Business Name	Created On
BRFName BRName employee@johnsonsgates.org	brfname.brname	Business Employee	1/1/1988	Text: (386) 748-5793 Phone 1: N/A Phone 2: N/A	✓	Johnsons Gates Lic	4/2/2020
BAFName BAName businessagent@johnsonsgates.org	bafname.baaname	Business Agent	1/1/1988	Text: (386) 748-5793 Phone 1: N/A Phone 2: N/A	✓	Johnsons Gates Lic	4/2/2020

4. **Check Change employee ID PASS role to: Select Business Agent**

5. **Save Changes**



The screenshot shows the 'Edit Account' form in the 'Identity Proofing Administrative Security System'. The form displays user details such as Login name, Business name, Display Name, Email, and Text Messages. Under 'iConnect EVV Mobile Site Roles', the 'EVV User' role is selected. Under 'iConnect Roles', the 'Service Provider Worker' role is selected. The 'IDPASS Role' section shows the current role as 'Business Employee' and offers options to change it to 'Business Agent' or 'Business Owner'. The 'Business Agent' option is highlighted in yellow. At the bottom right, there are buttons for 'Save Changes', 'Undo Changes', and 'Back to Search Page'.

STEP-BY-STEP – ID PASS

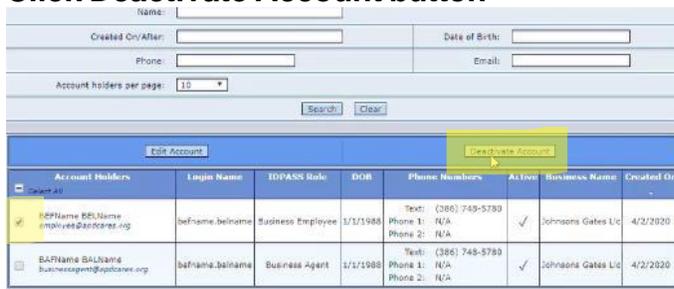
DELETE ACCOUNT HOLDER

1. **Select Account Holder** from Site Navigation menu



2. **Check the account** you want to deactivate

3. **Click Deactivate Account** button

A screenshot of the 'Account Holders' search and list interface. The search form includes fields for Name, Created On/After, Date of Birth, Phone, and Email, along with a dropdown for 'Account holders per page' set to 10. Below the search form is a table with columns: Account Holders, Login Name, IDPASS Role, DOB, Phone Numbers, Active, Business Name, and Created On. Two rows are visible, both with a checkmark in the 'Active' column. A yellow box highlights the 'Deactivate Account' button above the first row.

Account Holders	Login Name	IDPASS Role	DOB	Phone Numbers	Active	Business Name	Created On
<input checked="" type="checkbox"/> BAFName BBUName employee@spokane.org	bafrname.belname	Business Employee	1/1/1988	Text: (360) 745-5780 Phone 1: N/A Phone 2: N/A	<input checked="" type="checkbox"/>	Johnson's Gates Lic	4/2/2020
<input checked="" type="checkbox"/> BAFName BALName businessagent@spokane.org	bafrname.bainame	Business Agent	1/1/1988	Text: (360) 745-5780 Phone 1: N/A Phone 2: N/A	<input checked="" type="checkbox"/>	Johnson's Gates Lic	4/2/2020

4. **Click OK** on the pop-up box asking: “Are you sure you want to deactivate the account?”

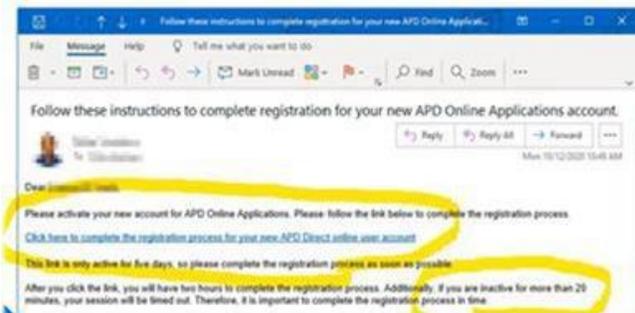


*Remember: when someone leaves your agency, you **must** deactivate the account. Otherwise, it is a HIPAA violation for allowing an individual access to confidential client information.*

STEP-BY-STEP – ID PASS

PROCESS OF BECOMING ACTIVE IN APD iCONNECT

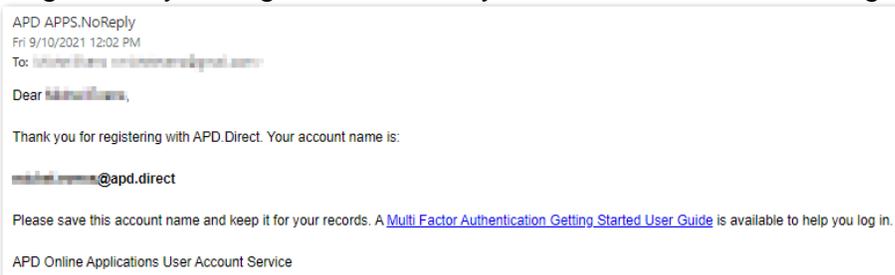
1. Once your employer has entered your information into ID PASS, you will receive an auto-generated email from APD Online Applications User Account Service at: apd.apps.noreply@apdf.onmicrosoft.com
 - a. The email **expires in five (5) days** so you must act, or your employer will have to manually email you the invitation again (*Remember: check your email daily, including spam and junk folders*). Also, do not click on the link in the email until you have time to complete the registration process. If you click on the link and do not complete the process, you **cannot** return to the link later to finish the process. A new email will have to be sent to you.
2. Click on the link to register your user credentials for APD Online Applications (i.e.. APD iConnect and/or EVV Mobile site). (**Completing the registration process creates your account in APD iConnect.**) The email that you will receive looks like this:



The link is time-sensitive and will expire within five (5) days.

During the process (after you clicked the link in the email), inactivity for more than 20 minutes will result in being timed-out and you will have to start over with your employer resending you the link.

3. Once you have registered your login credentials, you will receive the following email:



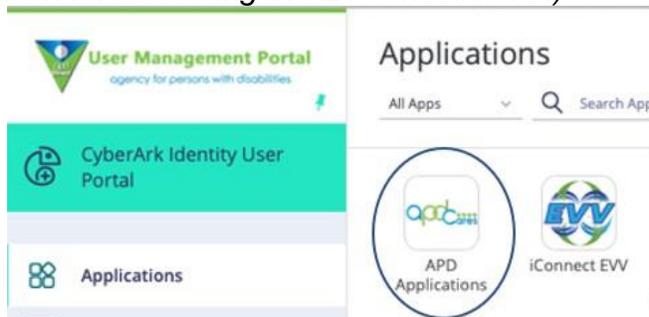
- a. **SAVE** this email, you may need it if you forget your username
4. Next, **Login to APD iConnect** to complete the registration process (*This allows your employer to link you as a worker and assign consumers to you as a provider*)

The steps to log in to APD iConnect are:

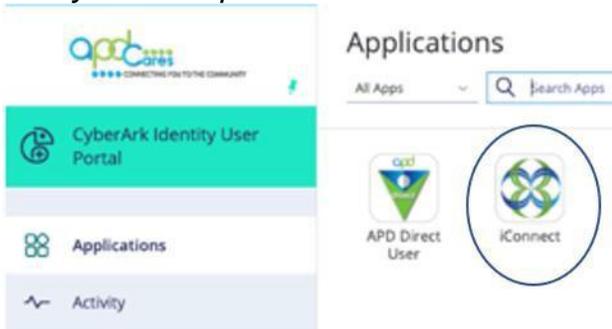
- i. **Login** to the user portal (<https://apddirect.my.idaptive.app/my>)

STEP-BY-STEP – ID PASS

- ii. **Select the APD Applications icon** (Note: the other icon iConnect EVV is the icon for accessing the EVV mobile site.)



- iii. **Click on the iConnect icon** (Note: if you click on the APD Direct User icon it will take you to the prior window as seen above.)

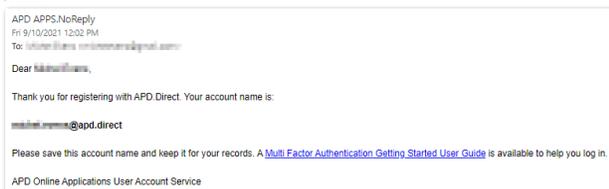


- iv. **Congratulations!** You have successfully signed in to APD iConnect and your employer will see your name on the Worker's Tab in the provider's record

5. If you do not complete the process within the five (5) days, your link expires
 - a. Contact your employer to send a new link again
 - b. Begin the process again once you receive the new email

If you do not remember your username and password you used when you created the user account, you must complete the following steps:

1. To recall your username, you can find the email the system sent you upon creating your user account



2. Then, **CALL** the APD IT Help Desk at (833) 400-3420 to request a password reset

If you need resources regarding APD iConnect processes, please refer to the resources and reference materials located on the [iConnect eLearning Library](#) for additional information or your local regional trainer(s).