

May 1, 2024

Identifying Multiple Workers with the Same Name

Do you have a hard time identifying between multiple workers with the same name? Are you a user who works for multiple organizations? Ask your manager/supervisor with the Service Provider Role to assign a title to your Worker Record within iConnect! They can use the Agency name to help identify the correct record.

The screenshot displays the iConnect web application interface. At the top, the user is logged in as 'Provider - 18915' with the role 'Service Provider'. The main navigation bar includes 'MY DASHBOARD', 'CONSUMERS', and 'PROVIDERS'. The 'PROVIDERS' section is active, showing a list of providers. A worker record for 'Provider - 18915' is selected, and the 'Workers' tab is active. The worker's details are shown in a form, including Member ID (2427), Last Name (Shorter), and First Name (Caroline). The 'Title' field is highlighted with a blue oval and an arrow, showing the value 'Provider - 18915'. Other fields include Business Address (1913 W. TAMPA ST), Business Address 2 (SUITE 515), City (TAMPA), State (FL), and Zip Code (33602).

Missing EVV Activities/Provider Documentation Activities

Have you identified missing Provider Documentation Activities? The Service Provider Role has the necessary permissions to delete existing documentation records. As an agency owner, if you feel that these permissions are unnecessary for your staff, manage their user accounts and remove the Service Provider role from their profile.

opd iConnect Blonde Simulation Provider Documentation
 Last Updated by caroline.shorter@apdcares.org
 at 2/15/2024 8:37:08 AM

File

- History
- Spell Check
- Save Provider Documentation
- Save and Close Provider Documentation
- Print
- Close Provider Documentation
- Delete Provider Documentation

Start Time	End Date *	End Time	Total Minutes	
1:00 PM	8/25/2023	2:00 PM	60	Delete
	08/25/2023			Add

PA Number

Activity Details

Division: APD Worker*

Provider: Simulation Behavior Provider Details Status

Have you identified missing EVV Activities? The Provider EVV Manager Role has the necessary permissions to delete existing EVV records. As an agency owner, if you feel that these permissions are unnecessary for your staff, manage their user accounts and remove the Provider EVV Manager role from their profile.

opd iConnect Simulation EVV Provider 2022 Activities
 Last Updated by evlinda.hamm@apdcares.org
 at 3/31/2023 2:24:28 PM

File

- History
- Save
- Save and Close
- Spell Check
- Delete
- Print
- Close Activities

Start Time	End Date *	End Time	Total Minutes	
2:24 PM	3/31/2023	2:24 PM	0	Delete
	03/31/2023			Add

257503 Consumer First Name * Holly

iConnect ID: 209648 Consumer Last Name * Bohl

Activity Details

Need to Update a Record in Complete Status?

Have you made a mistake when entering a note, form, or provider documentation and saved it in Complete Status in error? The Service Provider Role has the necessary permissions to “Unlock Record,” “Reverse Status,” or “Reverse Disposition.” This option changes the status back to “Draft” or “Pending” so that edits can be made.

opd iConnect Blonde Simulation Notes
 Last Updated by behavior.simulation@apd.direct
 at 9/19/2023 4:48:56 AM

File **Tools**

- History
- Spell Check
- Unlock Record
- Print

APD

Simulation, Behavior

09/19/2023

qpd iConnect Blonde Simulation Forms
 Last Updated by caroline.shorter@epdcanes.org at 2/15/2024 9:22:38 AM

File
 History
 Duplicate Forms
Reverse Status
 Print
 Close Forms
 Division * APD
 Approved By Shorter, Caroline [Details](#)

Worker * Shorter, Caroline [Details](#)
 Status * Complete
 Provider/Program * HelloFreshly [Details](#)
 Approved Date 02/15/2024

qpd iConnect Blonde Simulation Provider Documentation
 Last Updated by Behavior.Simulation@apd.direct at 8/26/2023 5:53:35 PM

File
 History
 Spell Check
Reverse Disposition
 Print
 Close Provider Documentation

Start Time	End Date *	End Time	Total Minutes	Rounded #
4:00 PM	7/29/2023	7:00 PM	180	180
	07/29/2023			

Using Filters

Have you been using iConnect for some time and are having challenges in locating specific records? Use the Filter Options available within most tabs/pages in iConnect. If performing a word search, update the criteria to “Contains” and type the word that is being searched.... Or type the first three letters of what needs to be searched, then click “Search”.

MY DASHBOARD CONSUMERS

Simulation, Barbie (215485)

Diagnosis Eligibility Medications Auths Provider Documentation Contacts Consumer Mod
 Demographics Divisions Consumer Budgets Programs Provider Selections SAN Notes

Filters
 Key Word AND
 Note Date +

Search Reset

11 Consumers Notes record(s) returned - now viewing 1 through 11

File

Filters

Apply Alert Days Before Due

48 My Dashboard Ticklers record(s) returned - now viewing 1 through 15

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
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Identifying where the Support Plan is from the Waiver Support Coordinator (WSC)

The WSC must send providers the Support Plan using a note in iConnect. In the My Dashboard chapter, under the Consumers column is a section for Notes for either Pending or Complete. Open the hyper link in the Notes section to view the Notes. There should be a note with the Note Type: Support Plan and Note Sub-Type: Provider Copy. Once you, as the provider, retrieve that Support Plan, leave this Note as unread so that you may refer back to that attached Support Plan whenever you need it. Leave the Note in Pending if it was sent in Pending.

File Reports

Quick Search

Consumers

MY DASHBOARD

CONSUMERS PROVIDER

Division

My Enrollments

Provider Selection

Notes

Complete	1
Pending	5

Filters

Status: Equal To Pending AND

iConnect ID: +

Search Reset

4 My Dashboard Notes record(s) returned - now viewing 1 through 4

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject
215401	French, Kate	APDs	Initial APD	02/07/2024	
208710	Kaehler, Martin	Facility Placement	Review Referral form	02/07/2023	Form for Martin Kaehler to be reviewed for Placement
208628	Kaehler, Martin	Support Plan	Provider Copy	12/09/2021	Completed

opd iConnect

Cap'n Crunch
Last updated by: martin.kaehler@opdncms.org
at 2/15/2024 11:52:04 AM

File Tools

Notes

Notes Details

Division: APO

Note By: Shofar, Caroline

Note Date: 02/15/2024

Program/Provider: WSC Qualified Organization 2022

Note Type: Support Plan

Note Sub-Type: Provider Copy

Description: 2024 Signed Person Centered Support Plan

Note: On 2/15/2024 at 11:50 AM, Caroline Shofar wrote:
See the Attached Support Plan - Do not mark this note as read until you save the attachment to your files and you are sent a new support plan for the upcoming year.

Status: Complete

Date Completed: 02/15/2024

Attachments

Document	Description	Category	Action
MOCK DOC.docx	PCSP Jan 2023		

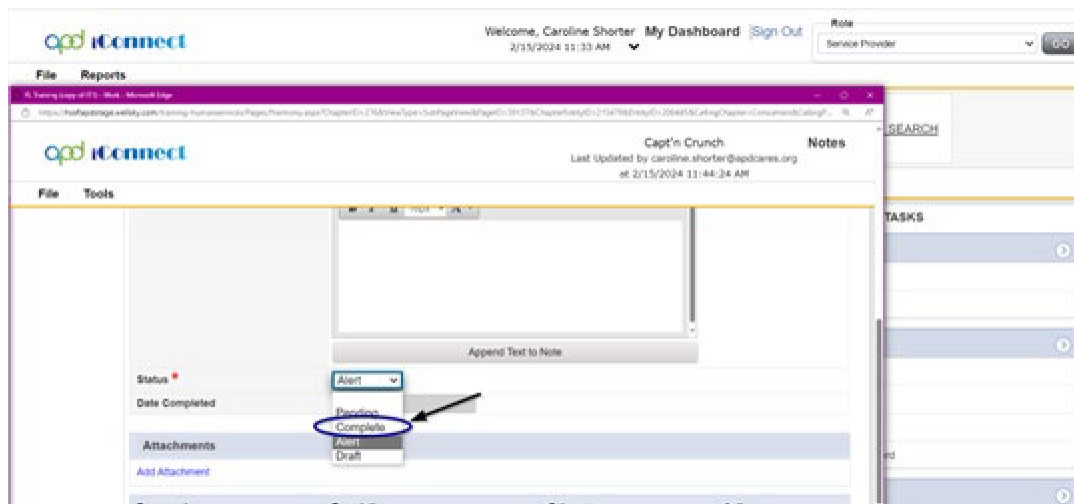
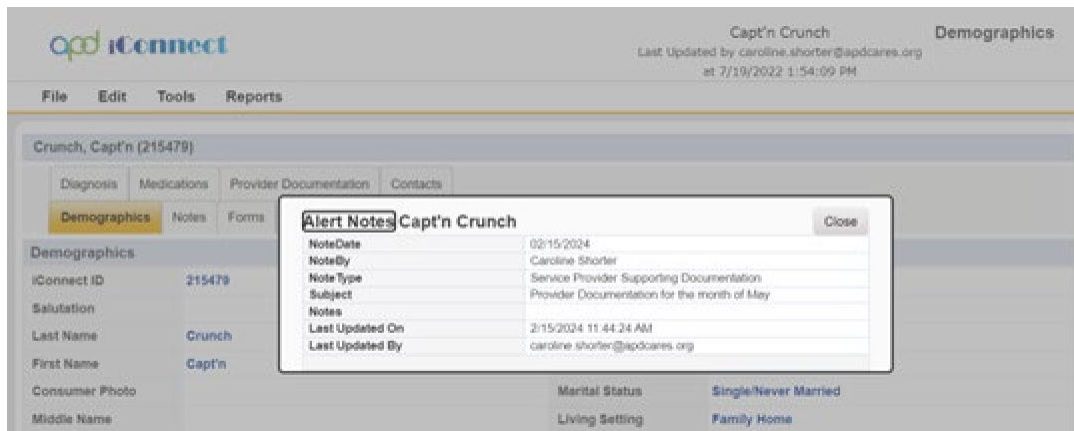
Note Recipients

Add Note Recipient:

Name	Date Sent	Date Read	Status	Date Signed
worker_held, Training	02/15/2024		Unread	

Why Do Alert Notes Appear When a Consumer Record is Opened?

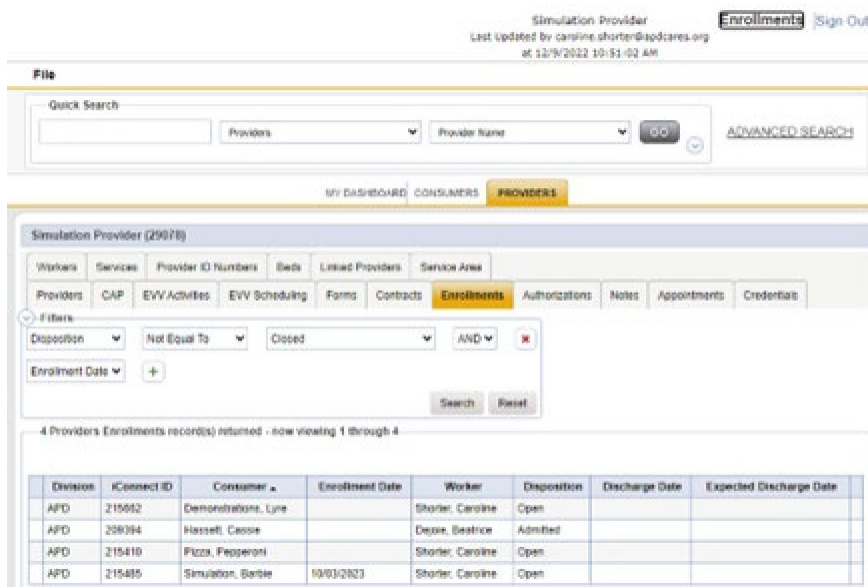
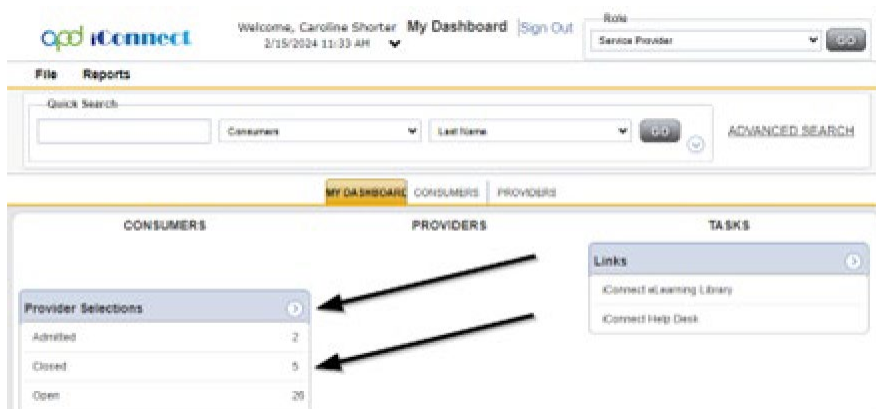
Do you see an Alert Note pop-up every time you open a consumer’s record? Evaluate the Note to see if it is for a consumer death or change in WSC. If it is not for either of those cases, then the Note needs to be updated to “Complete” Status. This update be completed by all roles. If you are unsure if the Note should be updated, contact your regional trainer.



June 1, 2024

Need to Know There Is A Provider Selection for Your Organization

Have you contacted the Waiver Support Coordinator and are eagerly waiting for the provider selection record to be added to the consumer’s record? Once the provider selection record is created, you will see the record from My Dashboard as a “Provider Selection” and from the Provider Chapter within the “Enrollments Tab”.



How Can I Change a Note in iConnect That Is Grayed Out?

If you see a Note in iConnect and you need to respond; however, you are unable to make any edits, you will want to check the status of that Note. If the Note is in Draft status, only the creator can make edits. Reach out to the creator of that Note and notify them that the Note needs to be in Pending status if a response is required. If the Note is in Complete status, a Help Desk Ticket will need to be created to determine if the status can be reversed. Depending on the workflow, a new Note may be required to be made. Not all Notes will be reversed if they are in the Complete status.

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 Details
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	

opd iConnect

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 Details
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	
Attachments	

How To Know if Notes Have Been Read

If you want to ensure a Note has been “Read,” navigate to the Notes Tab of the record you want to verify (Provider Notes will be in the Provider Record and Consumer Notes will be in the Consumer Record). Open the Note and scroll down until you come to the Note Recipients. Listed under the Note Recipients you will see a listed of names and their Status. In the Status, you can verify if the Note was “Read” or still “Unread.” The grid also informs you of when the Note was marked as “Read” and when it was “Sent.” If you notice that the Note was marked “Read” and you need that recipient to respond again, it is very crucial that you add them as a Note Recipient again.

*It is important that users mark Notes as “Read” when they have read/completed the needed task associated with the Note. This way the users can add them as a Note Recipient again if needed. **If you mark a Support Plan or Support Plan Provider Copy Note as “Read,” you will no longer have access to that Note.**

Note Recipients					
Add Note Recipient: <input type="text"/>					Clear
Name	Date Sent	Date Read	Status	Date Signed	
Appleton, Susan	02/19/2024		Unread		Remove
Baer, Sylvia	08/30/2022	02/19/2024	Read		
Baer, Sylvia	2/19/2024		Unread		Remove

How To Get Rid of Ticklers On Your Dashboard

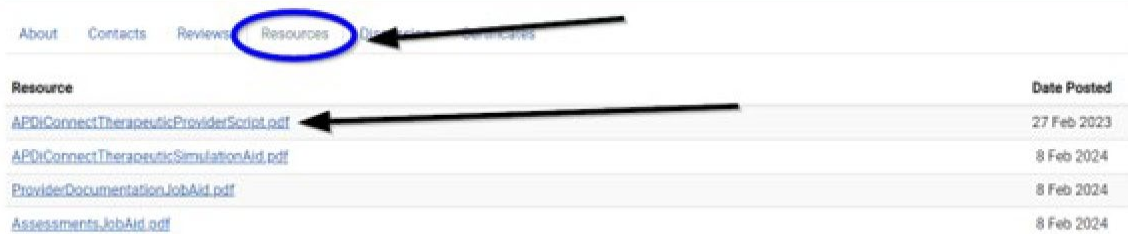
To remove a tickler from the Dashboard, click on the tickler pane to open the list view grid, on the right, hover the mouse cursor over the carat to open the menu of options, select Cancel or Complete and the Tickler will be removed from the my Dashboard count.

The screenshot shows the iConnect dashboard interface. At the top, there is a navigation bar with the iConnect logo, user information (Welcome, Caroline Shorter), and a 'Ticklers' tab. Below the navigation bar, there is a 'File' section with a filter panel. The filter panel includes dropdowns for 'Status' (set to 'Equal To'), 'New', and 'AND', along with an 'iConnect ID' field and a 'Search' button. Below the filter panel, a table displays '232 My Dashboard Ticklers record(s) returned - now viewing 1 through 15'. The table has columns for 'Consumer Name', 'iConnect ID', 'Tickler Name', 'Date Created', 'Date Due', 'Date Completed', 'Status', and 'Assigned To'. A dropdown menu is open over the 'Status' column, showing options: 'Cancel', 'Complete', and 'View Consumers Record'. Two arrows point from the text above to the 'Cancel' and 'Complete' options in the menu.

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Cats, HoneyBunches	215475	Send Application Acknowledgement Letter - Additional Info Needed	02/02/2022	02/02/2022		New	
Consumer, New	215481	Approved Professional Application Review is Complete - Close the Plan Record.	02/03/2022	02/03/2022		New	
Consumer, New	215481	Assign Initial QSI	02/03/2022	02/03/2022		New	
Church, CapEn	215475	Initiate and/or Update the Cost Plan	02/08/2022	02/08/2022		New	

Need A Transcript of TRAIN Course Modules in Writing

If you want to review the “Script”, aka Transcript of the TRAIN Florida Course Module, you can navigate to the Resources and locate the document with “Script” in the Title. Download, open and/or that pdf to follow along with the training course.



Resource	Date Posted
APDiConnectTherapeuticProviderScript.pdf	27 Feb 2023
APDiConnectTherapeuticSimulationAid.pdf	8 Feb 2024
ProviderDocumentationJobAid.pdf	8 Feb 2024
AssessmentsJobAid.pdf	8 Feb 2024

July 1, 2024

Attaching Documents From Outside of iConnect

Do you have additional information that you need to include in the Consumer or Provider record? Use the Note tab in either record to add a new note. Complete the required fields in accordance to the workflow you are following. Use the Add Attachment link to open the File Upload Form window. Click “Choose File” and locate the document from your device. Attachments can only be added within Notes.

File Tools

Notes Details

Division * APD ▾

Note By * Shorter, Caroline ▾

Note Date * 03/12/2024 📅

Program/Provider * Simulation Provider ▾ Details

Note Type * Service Provider Supporting Documentation ▾*

Note Sub-Type ▾

Description Prescription

Note

Status *
Date Completed

Attachments

Add Attachment

Attachments Grid

Document	Description	Category	Action
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File Upload Form - Work - Microsoft Edge

https://hssflapdstage.wellsky.com/training-humanservices/Dialogs/FileUploadForm.aspx?Chapte... A

File Choose File BLOCK DOC.docx

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.

Viewing History in iConnect

Is there a way to review the history of a page within iConnect? Use the “History” option under File on most screens within iConnect to see how changes were made. The example below shows the history of a planned service. There are two records within the history screen. Toggle through the pages to see what changes were made to the planned service.

It is important to note that you will only see the toggle to view different pages in the history if the item has been saved more than once.

File

- Spell Check
- History
- Print
- Close Planned Service

(*) indicates a required field

services

APD

2022

Begin Date 11/12/2021

End Date 06/30/2022

Index / SubObject			
Index Code	Index Description	SubObject	SubObject Description
SunCoast	SunCoast Region	Waiver	Budget Waiver

Service Ratio

Consumer County * HILLSBOROUGH

Geographic Differential * Non-Geographic

Provider Rate Type * Agency

Service Code * G9012-LIC

Service Description (4270) Support Coordination

Unit Type Month

Units Per * 1

Units of Measure * Month - Round Up

File

Unit Type	Month
Units Per *	1
Units of Measure *	Month - Round Up
Total No of Units	8
Annualized Units *	
Provider ID *	28927
Provider	Suncoast Region Specific Agency
Rate *	\$148.69
Max Amount *	\$1,185.52
Amount Requested	
Authorization Notes/Comments *	comments
Contract Number	
Non-Taxable	False
Planned Service Status	State Review Approved
Allow EVV Delivery	False
EVV Comments	
Disable	False

First Previous Record 1 of 2 Next Last

Unable to See Workers in iConnect

When reviewing the list of workers within my Provider Record, I'm not able to see an employee. The employee reports as having signed into iConnect. What is going on? It is likely that your employee has multiple employments and may be signing into an account created by another organization. You will need to use the ID Proofing Admin

Security to grant this employee access through your organization.

Simulation Provider
Last updated by caroline.shorter@apdcares.org
at 12/4/2023 7:14:39 PM

Workers | Sign Out | Role: Service Provider

File

Simulation Provider (29081)

Workers | Services | Provider ID Numbers | Beds | Linked Providers | Service Area

Providers | CAP | EVV Activities | EVV Scheduling | Forms | Contracts | Enrollments | Authorizations | Notes | Appointments | Credentials

Filters
Worker Name [] +
Search [] Reset []

4 Providers Workers record(s) returned - now viewing 1 through 4

Worker Name	Title	Phone Number
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]

First Previous Records per page 15 Next Last

User Management Portal
agency for persons with disabilities

CyberArk Identity User Portal

Applications

Devices

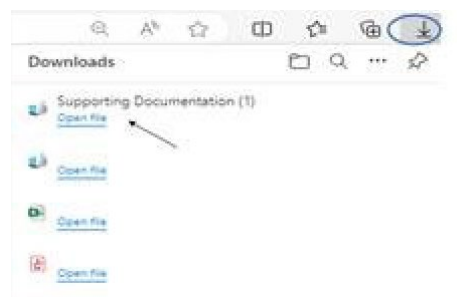
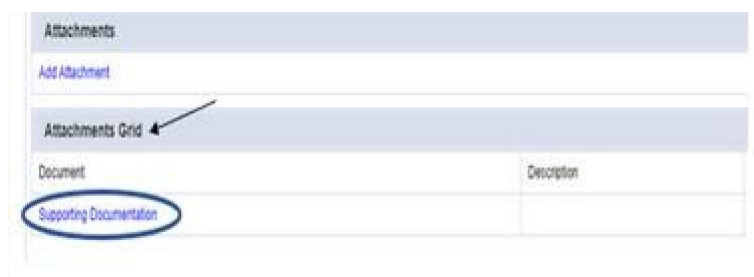
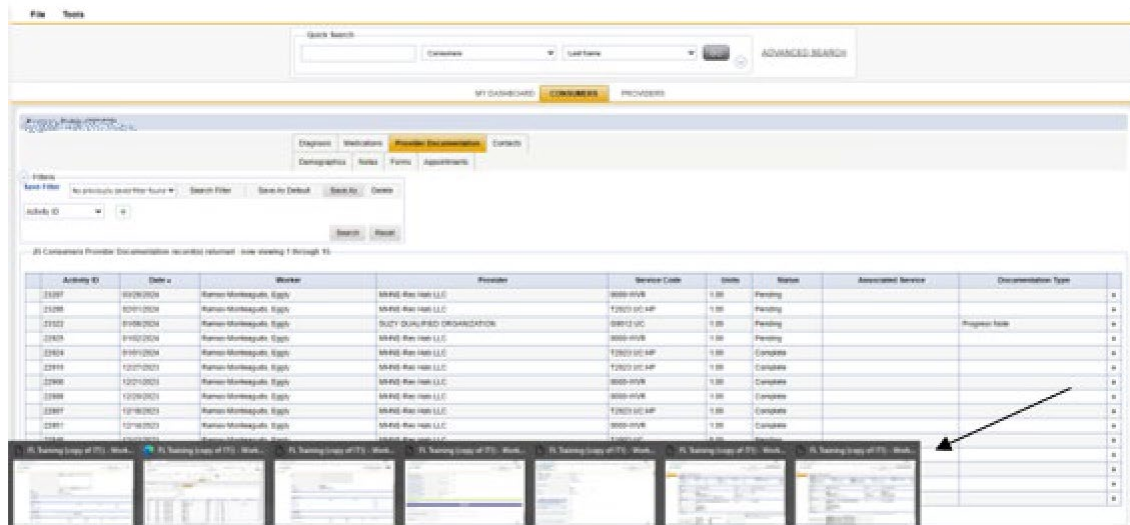
Applications

All Apps [] Search Apps []

APD Applications | iConnect EVV | ID PASS ID Proofing Admin Security | Portal User Guide

Time-Out Feature in iConnect

Have you been timed out of iConnect while you have several windows open, causing you to complete the authentication steps again? iConnect system will time-out if no activity has been detected after 90 minutes. When working in iConnect, close those windows that are not in use and download to your device those documents that need to be reviewed.

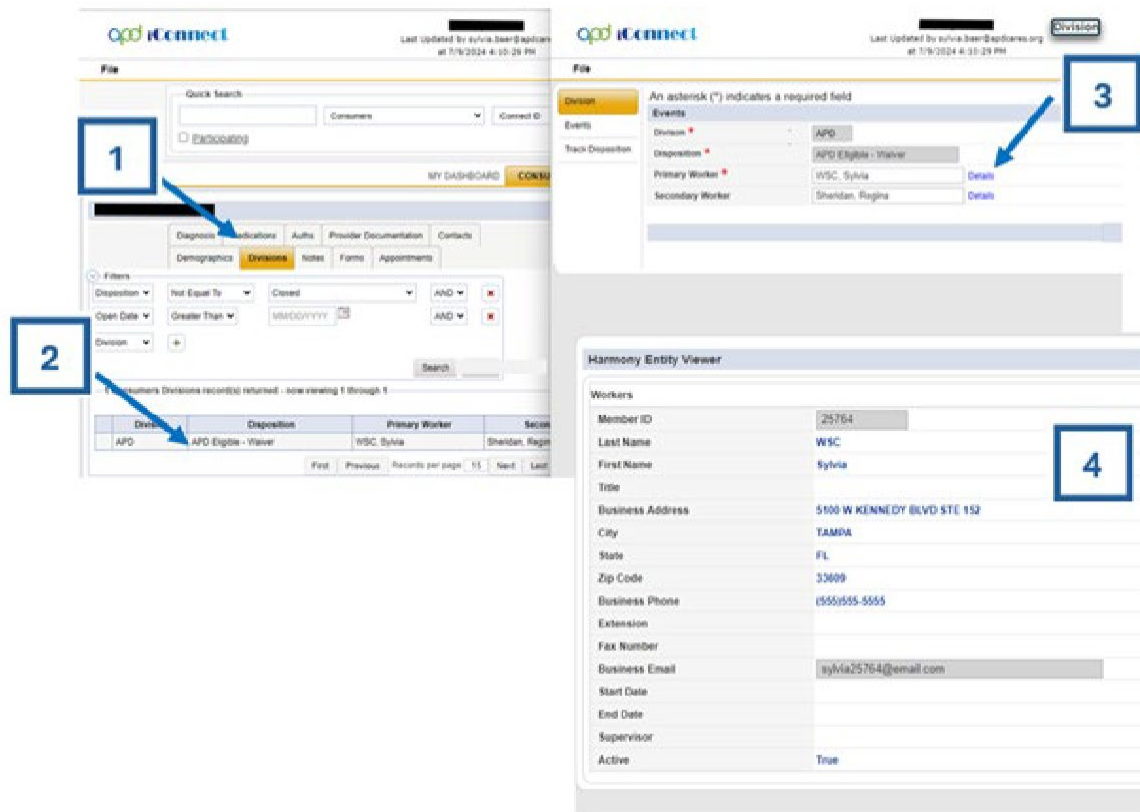


August 1, 2024

Division Tab – Locating WSC’s Contact Information for Client

A new enhancement has been implemented in iConnect that now allows the Service Provider and Service Provider Worker roles to access the Division tab of the clients that they have authorizations for in iConnect. This will allow the Service Provider and the Service Provider Worker to find details of the WSC for that client. The Division tab is maintained by APD staff. The WSC’s information in iConnect is maintained by the Service Providers of the Qualified Organization that employs the WSC. To locate the

details for the client's WSC, navigate to the client's record in iConnect. Then click the Divisions tab. The list view grid will display the "APD Eligible – Waiver" hyperlink. Once the hyperlink is clicked, a pop-up will display with the Primary Worker. Click "Details" next to the Primary Worker's name. A pop-up will display the business phone number, and the email address of the WSC.



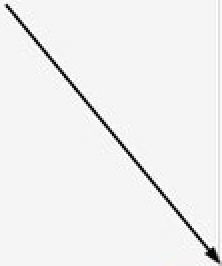
Characters Available on Form Text Fields in iConnect

Is there a way to see the character limits within iConnect?

When working within a form, there is usually an indicator of how many characters are available within a text field. This is not available within the Notes but IS available with provider documentation. As you type into the boxes, these characters remaining will countdown to zero.

File

Preliminary statement of problem behaviors, relevant consumer description, living situation, daily routine, health issues, other relevant details: *



4000 characters remaining



File

Activity Details

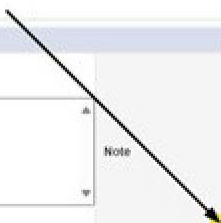
Division	<input type="text"/>	Worker*	Shorter, Caroline	Lookup	Clear	Details
Provider	<input type="text"/>	Status	Pending			

Activity Services

Service *	<input type="text"/>	<input type="text"/>	Clear	Total Cost	<input type="text"/>
Units *	<input type="text"/>				
Rate	<input type="text"/>				
Secondary Code	<input type="text"/>				
Unit Type	<input type="text"/>				

Documentation

Provider Documentation Type *	<ul style="list-style-type: none">Annual ReportDaily Attendance LogMonthly R&BMonthly SummaryProgress NoteQuarterly SummaryService Log	Note	<div style="border: 1px solid gray; padding: 5px;">B I U 16px A</div> <div style="border: 1px solid gray; height: 80px;"></div>
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50000 characters remaining

How do I access the Service Desk Ticket that my staff has submitted?

When your employee signs into the Service Desk to add a new Ticket, they can include you as the cc: and then you will receive a copy of the ticket and subsequent updates

through your e-mail.

opo itconnect

CC
System Tickler -

Site: Tampa, FL
Department: APD Employees

Requester Type: Not Set
Requester Phone:

Consumer iConnect ID
Provider iConnect ID

Cancel Create

Can I generate a tickler?

WSCs and APD Staff have the opportunity to generate reminder ticklers of their own to manage their work. To do so, open the consumer's record, select the Ticklers menu option to open the list view grid. Use File to Add Ticklers Detail and complete the fields, then save to trigger the tickler for the Due Date selected.

opo itconnect

Simulation, Barbie (215488)

File Edit Tools Reports **Ticklers** Word Merge

Quick Search: Consumers Last Name

ADVANCED SEARCH

File

An asterisk (*) indicates a required field

Manual Tickler

Tickler: Self Generated Reminder

Qualify: Qualify

Date Due: 06-08-2024

Assigned To: Shorter, Caroline

Message: Mitar Qualify

File

Add Ticklers Detail

Close Ticklers

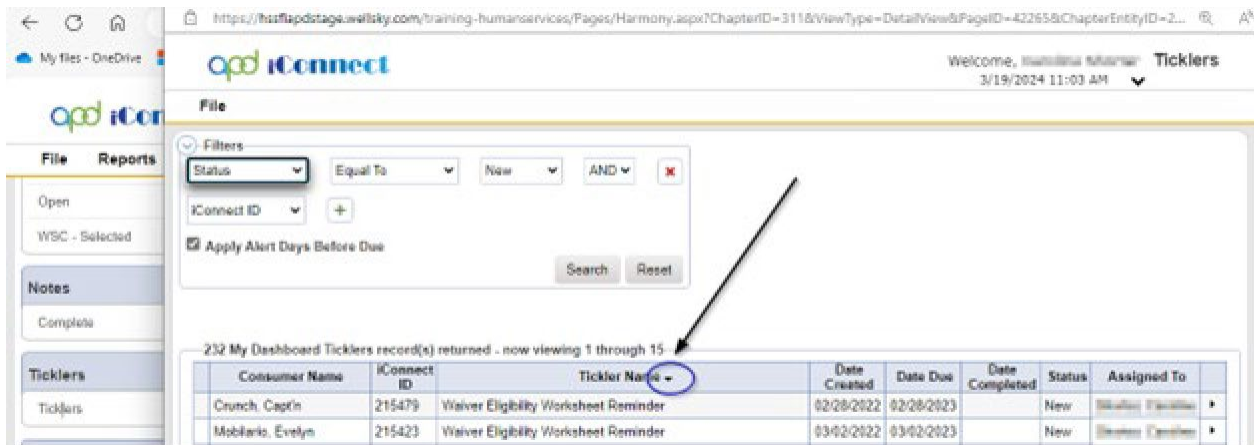
Apply Alert Days Before Due

How do I sort through my Ticklers?

Have you allowed your tickler list view to grow and now are having a challenge in prioritization? Use the sort feature and the filters to locate and prioritize your list of ticklers. You can sort the list by clicking on one of the headings (Consumer Name, iConnect ID, Tickler Name, Date Created, Date Due, Date Completed, Status, Assigned to).

The caret (▲) indicates that the list is in alphabetical order/oldest to newest/largest to smallest.

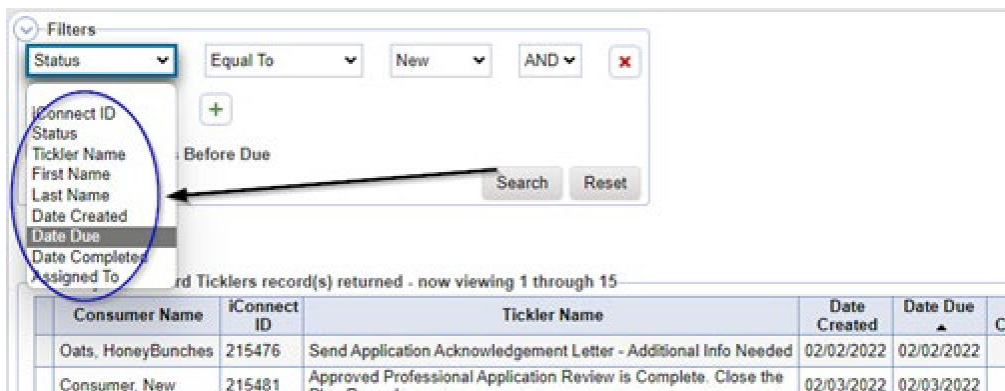
The caret (▼) opposite of alphabetical/newest to oldest/smallest to largest.



The screenshot shows the iConnect Ticklers dashboard. A filter panel is open, showing a dropdown menu for 'Status' and a search button. Below the filter panel, a table displays tickler records. The 'Tickler Name' column has a dropdown arrow, and an arrow points to it from the text above. The table has the following data:

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Crunch, Cap'n	215479	Waiver Eligibility Worksheet Reminder	02/08/2022	02/08/2023		New	Sharon Faciles
Moblaris, Evelyn	215423	Waiver Eligibility Worksheet Reminder	03/02/2022	03/02/2023		New	Sharon Faciles

In addition, use filters to sort the data made available on the list view grid.



The close-up screenshot shows the filter panel with a dropdown menu open, listing various sorting options. An arrow points to the 'Date Due' option. The table below shows the following data:

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed	Status	Assigned To
Oats, HoneyBunches	215476	Send Application Acknowledgement Letter - Additional Info Needed	02/02/2022	02/02/2022		New	Sharon Faciles
Consumer, New	215481	Approved Professional Application Review is Complete. Close the	02/03/2022	02/03/2022		New	Sharon Faciles

September 1, 2024

Deleting Provider Documentation

Is there a way to delete provider documentation?

Yes, if the record is in pending status, you are able to use the File menu to Delete Provider Documentation when you are using the Service Provider Role.

The screenshot shows the iConnect software interface. At the top left is the 'iConnect' logo. At the top right, it says 'Blonde Simulation' and 'Provider Documentation'. Below that, it says 'Last Updated by caroline.shorter@apdcare.org at 2/13/2024 8:37:08 AM'. The main area is a form with a 'File' menu open on the left. The menu items are: 'Hist', 'File', 'Spell Check', 'Save Provider Documentation', 'Save and Close Provider Documentation', 'Print', 'Close Provider Documentation', and 'Delete Provider Documentation'. The 'Delete Provider Documentation' option is circled in blue. An arrow points from this option to the 'Status' dropdown in the 'Activity Details' section, which is set to 'Pending'. The 'Activity Services' section shows 'Service *' as '0000-WVR', 'Units *' as '1.00', and 'Rate' as '\$0.00'. The 'Documentation' section is partially visible at the bottom.

October 1, 2024

Can I save Provider documentation while I'm in the middle of working on it?

Yes, when working within iConnect, as long as the required fields are completed, the provider documentation record can be saved in case the user needs to step away to answer a phone call or attend to another matter.

Once the user is ready to finish the notes, return to the record and continue typing into the Note Field.

File

Provider Documentation

Claims

An asterisk (*) indicates a required field

Activity Times

Rounding Rule: Nearest 15 min

Start Date *	Start Time	End Date *	End Time	Total Minutes	Rounded Minutes	
03-15-2024	1:00 PM	03-15-2024	2:00 PM	60	60	Delete
03-15-2024		03-15-2024				Add

Authorization

Auth ID: 257940 PA Number: []

Activity Details

Division: APD Worker*: Shorler, Carolina Lookup Clear Details

Provider: Simulation Behavior Provider Details Status: Pending

Activity Services

Service*: [] Clear Total Cost: []

Units*: 4

Rate: []

Secondary Code: []

Unit Type: []

Documentation

Provider Documentation Type * []

Annual Report [] Service Log []

Daily Attendance Log []

Monthly R&M []

Monthly Summary []

Progress Note []

Quarterly Summary []

Note []

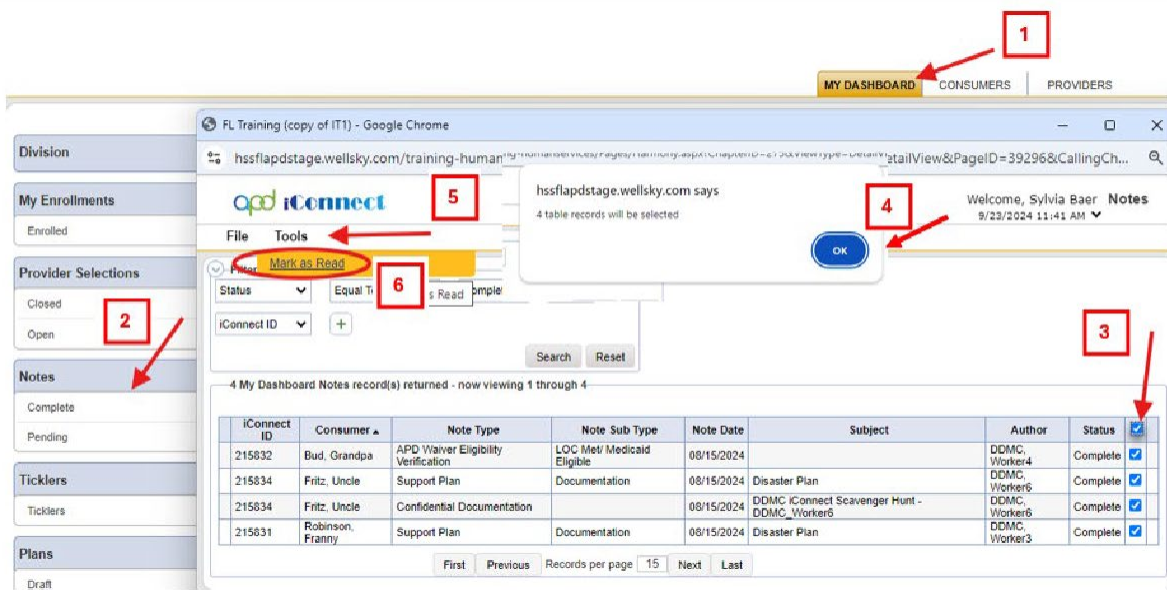
November 1, 2024

How do I clear out Notes that are listed on my Dashboard Screen?

Open the Notes list view grid from my Dashboard. Select the notes by using the check boxes on the right side of the list view grid. Use the Tool menu dropdown to mark the note as read

IMPORTANT: Service Providers that “Mark as Read” the Note containing the Support Plan will no longer have access to that Support Plan Note. They will need

to reach out to the WSC to retrieve that Support Plan Note.



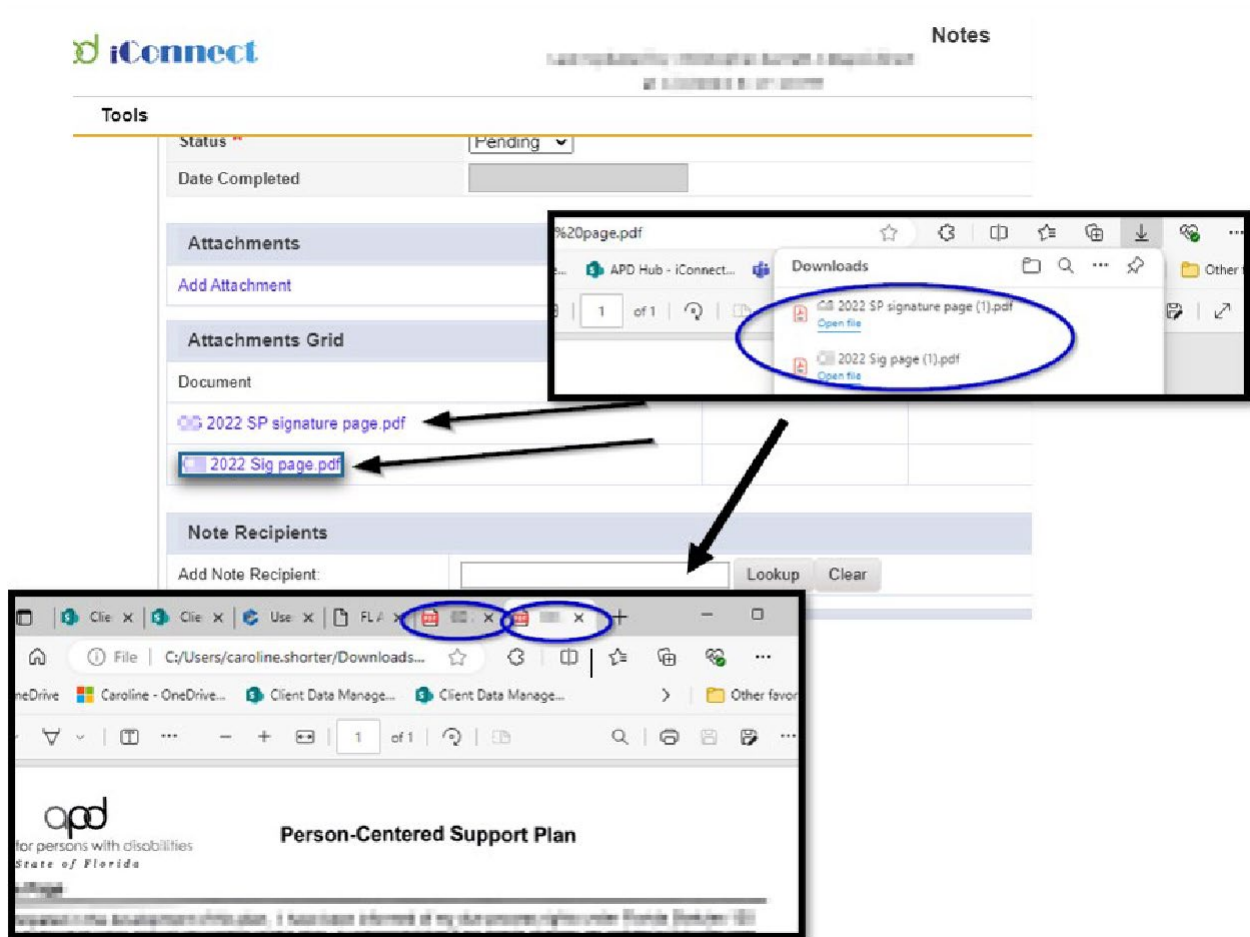
December 1, 2024

Opening Multiple Attachments That Are Within the Notes Tab

When there is a need to review all the attachments within one Note, are users required to open each attachment then close that attachment to then open another?

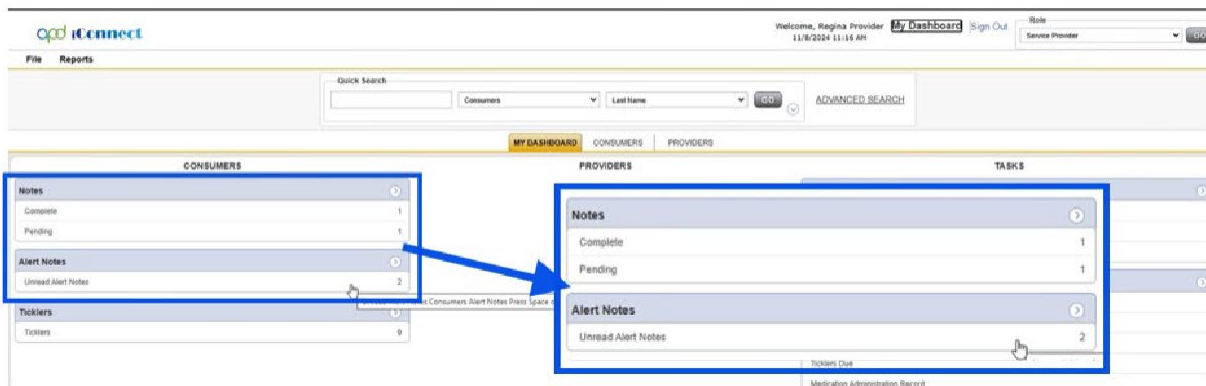
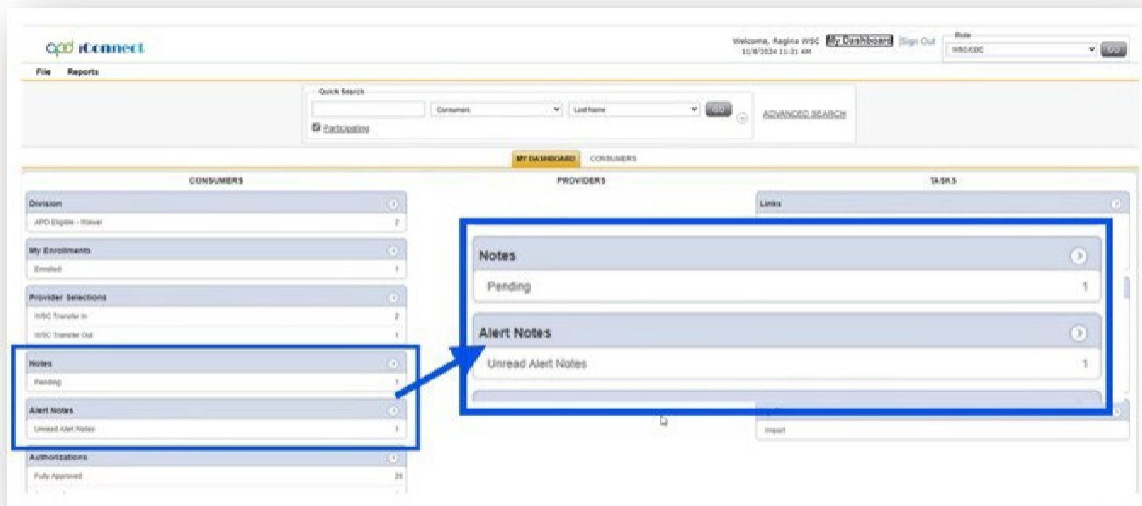
No, when the user clicks on one attachment, the file will download onto their device, so the user can open multiple files at one time by downloading all the files and opening them from the device. This allows for multiple documents to remain open at the same

time until the user closes them.



Where do we find Alert Notes?

Alert Notes are important Notes to inform the providers of a significant change regarding their client. Based upon user feedback, the Alert Note pane within the Consumer column is now below the Note pane, so all Note types are in close proximity to each other in order to save users time and prevent confusion when reviewing for unread Notes.

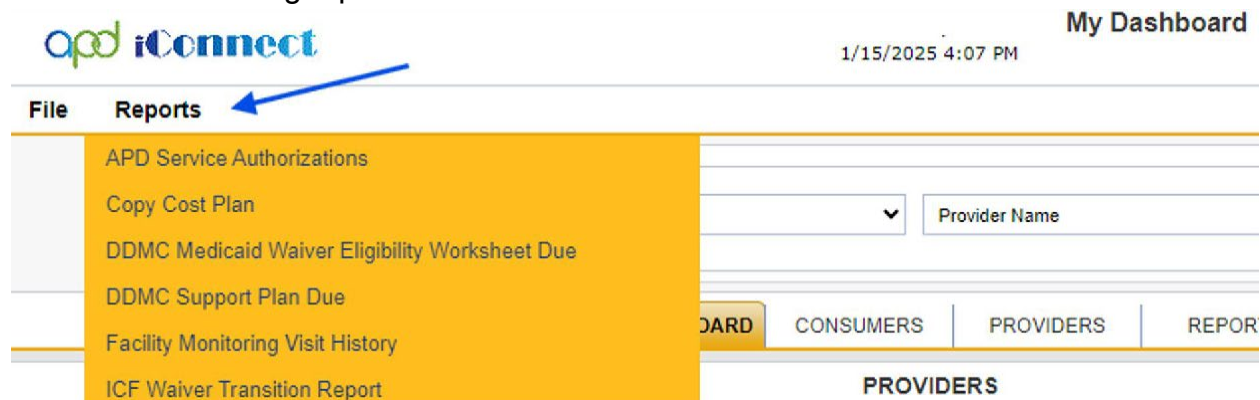


February 1, 2025

Where do I find reports in iConnect?

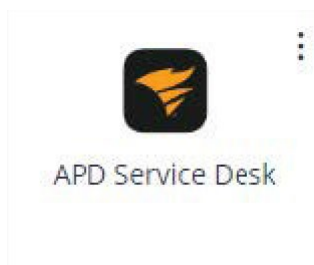
Reports are found in different screens within iConnect depending on their usage and workflow. Locate the Reports menu dropdown on the screen to see what reports are available for you to use. Remember to refer to the job aids available for detailed

instructions on using reports.

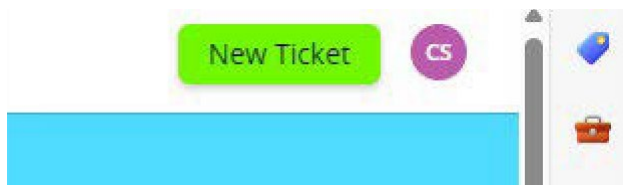


How do I create a service desk ticket through CyberArk?

1. Sign into the user portal (aka CyberArk) and click on the “APD Service Desk” icon.
 - a. Click on the icon to open the application.

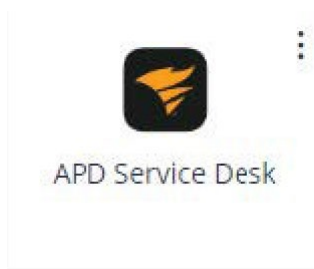


2. Click the “New Ticket” button located on the upper right side of the screen to open the new ticket window and fill out the required fields in order to open a new helpdesk ticket.



How do I access a service desk ticket already created?

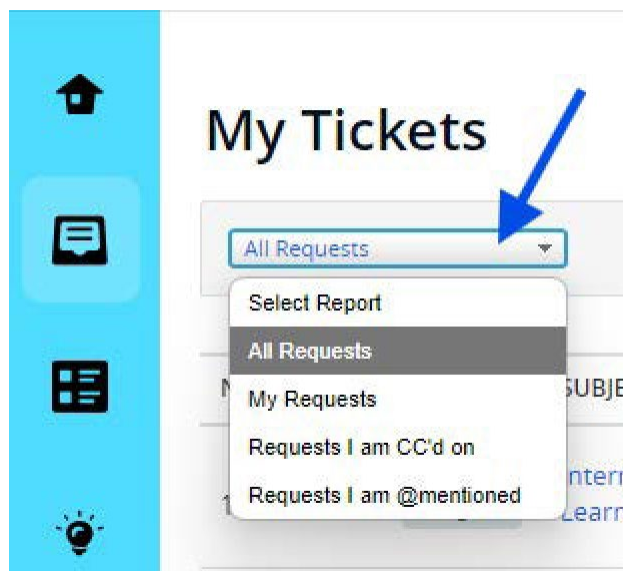
1. Sign into the user portal (aka CyberArk) and click on the “APD Service Desk” icon.
 - a. Click on the icon to open the application.



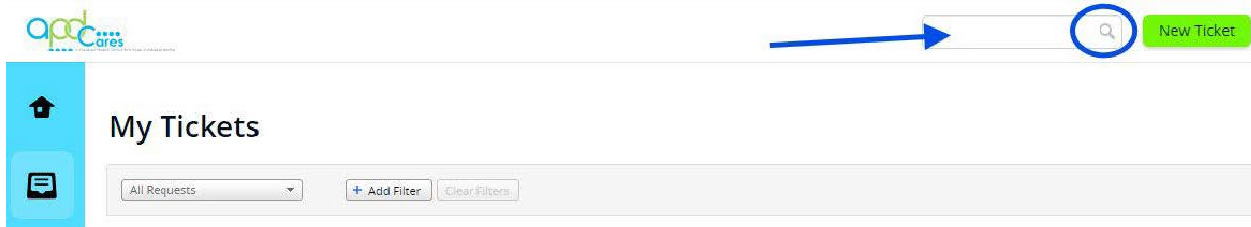
2. Click the ticket icon on the left side of the screen.
 - a. If you hover over the ticket icon it will display "My Tickets."



3. A list of all tickets associated with the account will display. The list can be filtered, using the dropdown menu, to show tickets that were requested by the user or tickets where the user was copied or mentioned.



4. Use the search engine at the top of the screen to locate a specific ticket. Search by ticket number or key words to locate a specific ticket. Click the magnifying glass to execute the search.



March 1, 2025

How long does it take for the preauthorization (PA) Number to show on service authorizations?

A Waiver Support Coordinator (WSC) initiates the approval process for a service authorization when the WSC creates or updates an existing service authorization in iConnect. This creates a PA number, so that services rendered may be billed. This process involves the iConnect interface with the Florida Medicaid Management Information System (FMMIS). When the WSC creates a new service authorization or updates an existing service authorization, the interface with FMMIS runs as follows:

- Service authorization information is sent outbound to FMMIS at 01:00 a.m.
- Additional information is then returned to iConnect at 05:00 a.m.

Once the inbound information is received, the PA number is assigned to the authorization in iConnect.

Example of an authorization in “Ready to Send” status:

Auth Service ID	Service Code	Service	Start Date	Unit Type	End Date	Auth Service EDI Status	Max Units	Status	Rate	Amount Approved	Cancelled	Provider Rate Type	Consumer County	Service Ratio
140094	S2507.UC	(4260) Speech Therapy	05/13/2019	15 mins	06/30/2019	Ready to Send	14	Approved	\$16.02	\$2,242.80	No	Agency	Hernando	
140093	S5130.UC	(4140) Personal Supports	05/01/2019	15 mins	06/30/2019	Ready to Send	172	Approved	\$3.82	\$657.04	No	Agency	Hernando	1:1

Example from iConnect of an authorization in “Approved” status from the Auth tab, within the list view grid, after opening the authorization, and opening the AuthService tab:

The image consists of three screenshots from the iConnect system, illustrating the workflow for viewing an authorization's status across different tabs.

Top Screenshot: List View Grid
 This screenshot shows a list of 13 authorization records. The columns include Division, Provider, Auth ID, Start Date, End Date, Status, and Cancelled. The status column for the selected record (Auth ID 230708) is highlighted in yellow and labeled "Approved". A yellow box also highlights the "Fully Approved" status in the "Status" column of the same record.

Division	Provider	Auth ID	Start Date	End Date	Status	Cancelled
APD	Pending Provider		06/05/2019	06/30/2019	Approved	No
APD			06/05/2019	06/30/2019	Approved	No
APD		230708	05/01/2019	06/30/2019	Approved	No
APD		177480	01/01/2019	06/30/2019	Approved	No
APD		177480	01/01/2019	06/30/2019	Approved	No
APD		177480	01/01/2019	06/30/2019	Approved	No
APD	A Test Provider	230708	01/01/2019	06/30/2019	Fully Approved	No

Middle Screenshot: Authorization Details
 This screenshot shows the details for the selected authorization. The "Status" field is highlighted in yellow and labeled "Fully Approved".

Bottom Screenshot: Auth Service Details
 This screenshot shows the details for the authorized service. The "Auth Service EDI Status" field is highlighted in yellow and labeled "Approved".

April 1, 2025

How are the list view grids used in iConnect?

All tabs within the Consumer or Provider Records within iConnect will contain a list view grid to show all the items saved within the tab. Clicking on the heading of a column sorts the list in ascending or descending order. The text box at the bottom of the screen allows users to adjust the number of records displayed in the list view grid that they would like to have populated.

File

Quick Search
 Consumers [ADVANCED SEARCH](#)
 Participating

MY DASHBOARD **CONSUMERS**

10 Consumers Quick Search Result record(s) returned - now viewing 1 through 10

	iConnect ID	Last Name	First Name	Status	Region	
<input type="checkbox"/>	215544	AprilSC_1	Jeanine	Active	SUNCOAST	▼
<input type="checkbox"/>	215556	AprilSC_10	Joan	Active	SUNCOAST	▼
<input type="checkbox"/>	215547	AprilSC_2	Laura	Active	SUNCOAST	▼
<input type="checkbox"/>	215548	AprilSC_3	Nadene	Active	SUNCOAST	▼
<input type="checkbox"/>	215549	AprilSC_4	Daniela	Active	SUNCOAST	▼
<input type="checkbox"/>	215550	AprilSC_5	Rehana	Active	SUNCOAST	▼
<input type="checkbox"/>	215552	AprilSC_6	Stephanie	Active	SUNCOAST	▼
<input type="checkbox"/>	215553	AprilSC_7	Gloria	Active	SUNCOAST	▼
<input type="checkbox"/>	215554	AprilSC_8	Taushia	Active	SUNCOAST	▼
<input type="checkbox"/>	215555	AprilSC_9	Shannon	Active	SUNCOAST	▼

First Previous Records per page 15 Next Last

Can iConnect users print the list view grids?

Yes, printing is available using the Menu File > Print option, only after clicking on a heading.

The screenshot shows the iConnect application interface. A blue circle highlights the 'File' menu, and another blue circle highlights the 'Print' option. Below this, a print preview window is open, showing a list of 10 consumers. The print settings are: Total: 1 sheet of paper, Printer: (selected), Copies: 1, Layout: Portrait, Pages: All. The print preview shows the same table of consumer data as seen in the first screenshot.

File

Print

FL Training (copy of IT1) - Work - Microsoft Edge
<https://hssflapstage.wellsky.com/training-humanservices/Pages/PrintView.aspx>

Print
 Total: 1 sheet of paper

Printer

Copies

Layout
 Portrait
 Landscape

Pages
 All

Print Cancel

10 Consumers

	iConnect ID	Last Name	First Name	Status	Region	
<input type="checkbox"/>	215544	AprilSC_1	Jeanine	Active	SUNCOAST	▼
<input type="checkbox"/>	215556	AprilSC_10	Joan	Active	SUNCOAST	▼
<input type="checkbox"/>	215547	AprilSC_2	Laura	Active	SUNCOAST	▼
<input type="checkbox"/>	215548	AprilSC_3	Nadene	Active	SUNCOAST	▼
<input type="checkbox"/>	215549	AprilSC_4	Daniela	Active	SUNCOAST	▼
<input type="checkbox"/>	215550	AprilSC_5	Rehana	Active	SUNCOAST	▼
<input type="checkbox"/>	215552	AprilSC_6	Stephanie	Active	SUNCOAST	▼
<input type="checkbox"/>	215553	AprilSC_7	Gloria	Active	SUNCOAST	▼
<input type="checkbox"/>	215554	AprilSC_8	Taushia	Active	SUNCOAST	▼
<input type="checkbox"/>	215555	AprilSC_9	Shannon	Active	SUNCOAST	▼

Records per page 15

215555 AprilSC_9 Shannon

May 1, 2025

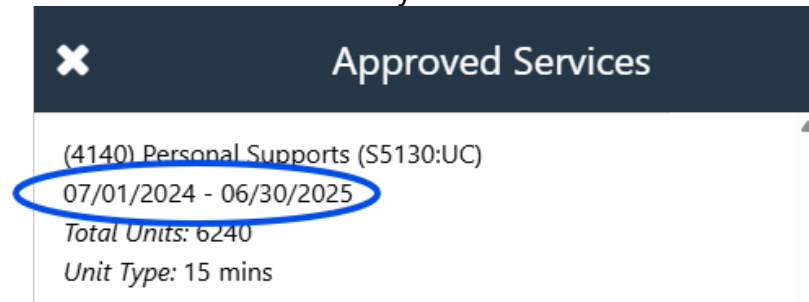
Verifying the dates of a service authorization

One of the fields that the worker completes when documenting services in the Provider Documentation tab of the Consumer's record or through the EVV Mobile site is the authorization associated with the service being rendered along with the time frame for in which that service was rendered.

Prior to selecting the authorization, the worker should verify the dates associated with that authorization.

EVV Mobile Site

On the EVV Mobile site, the date that the authorization is valid for is under the name of the service. It is important to select the correct authorization, since this field cannot be edited once the EVV Activity is started.



iConnect

On the Provider Documentation tab of the Consumer's record in iConnect, the worker must click the ellipses to view the authorizations. As shown below, all the authorizations are visible for that provider. The last option is in not always the correct authorization.

The worker will need to verify the Start Date and End Date of the authorization.

In this example below, the worker is documenting services for the 2024-2025 fiscal year. The authorizations listed show the next fiscal year authorizations. The worker will need to review the dates to select the correct authorization.

7 Consumers Auth Search record(s) returned - now viewing 1 through 7

8 Consumers Auth Search record(s) returned - now viewing 1 through 8

Auth ID	Auth Date	Provider	Start Date	End Date
	07/03/2020		07/03/2020	06/30/2021
	08/04/2020		08/01/2020	06/30/2021
	07/01/2021		07/01/2021	06/30/2022
	07/01/2022		07/01/2022	06/30/2023
	07/01/2023		07/01/2023	06/30/2024
	05/23/2024		05/01/2024	06/30/2024
	07/01/2024		07/01/2024	06/30/2025
	07/01/2025		07/01/2025	06/30/2026

Clicking the plus sign next to the authorization will give additional information on that authorization. In the example below, the 2023-2024 fiscal year authorization had Personal Supports only valid through 04/30/2024. That was verified by clicking the plus sign to see each specific service's Start Date and End Date.

Auth Service ID	Service Code	Service	Start Date	End Date	Max Units	Auth Service EDI Status	Max Amount
586123 07/01/2022 [Redacted] 07/01/2022 06/30/2023							
70389	S5130:UC	(4140) Personal Supports	07/01/2022	06/30/2023	3492	Approved	\$19,101.24
70388	S5135:UC	(4080) Life Skills Development - Level 1 (Community Inclusion)	07/01/2022	06/30/2023	4764	Approved	\$24,153.48
7 [Redacted] 07/01/2023 [Redacted] 07/01/2023 06/30/2024							
71512	S5130:UC	(4140) Personal Supports	07/01/2023	04/30/2024	2315	Approved	\$15,945.05
71513	S5135:UC	(4080) Life Skills Development - Level 1 (Community Inclusion)	07/01/2023	06/30/2024	5222	Approved	\$26,475.54
C-12000 05/23/2024 [Redacted] 05/01/2024 06/30/2024							

June 1, 2025

Sorting the List View Grid in iConnect

Users may find it beneficial to sort the list view grid when looking for a particular client, form, provider documentation, note, etc. within iConnect

Utilizing the Quick Search on the My Dashboard, you can then generate a list view grid with related information to the variable you searched for. The following is an example, of searching by the variable: Consumer's Last Name containing an S.

30 Consumers Quick Search Result record(s) returned - now viewing 1 through 15

	iConnect ID	Last Name	First Name	Status	Region	
<input type="checkbox"/>	225915	Santiago	Jorge	Active	SOUTHEAST	▼
<input type="checkbox"/>	210034	Schlabach	Tonya	Active	SUNCOAST	▼
<input type="checkbox"/>	209943	Schumann	Tina	Active	SUNCOAST	▼
<input type="checkbox"/>	209707	Schweizer	Cassidy	Active	CENTRAL	▼
<input type="checkbox"/>	209814	Shedd	Ricardo	Active	SUNCOAST	▼
<input type="checkbox"/>	209938	Sheikh	Eduardo	Active	SOUTHERN	▼
<input type="checkbox"/>	209640	Sherwin	Danielle	Active	CENTRAL	▼
<input type="checkbox"/>	209646	Sherwin	Julie	Active	CENTRAL	▼
<input type="checkbox"/>	209720	Shim	Brandi	Active	CENTRAL	▼
<input type="checkbox"/>	209956	Shivers	Jill	Active	NORTHEAST	▼
<input type="checkbox"/>	209952	Shivers	Jillian	Active	CENTRAL	▼
<input type="checkbox"/>	209645	Shumate	Delaney	Active	CENTRAL	▼
<input type="checkbox"/>	209865	Sigala	Alexis	Active	SOUTHEAST	▼
<input type="checkbox"/>	215485	Simulation	Barbie	Active	SUNCOAST	▼
<input type="checkbox"/>	225956	Simulation	Paul	Active	SOUTHERN	▼

Each column within the list view grid contains a header (i.e. iConnect ID, Last Name, First Name, and so on, depending on the specific list view grid). These Headers are clickable and can be used to sort data.

30 Consumers Quick Search Result record(s) returned - now viewing 1 through 15

	iConnect ID	Last Name	First Name	Status	Region	
<input type="checkbox"/>	225915	Santiago	Jorge	Active	SOUTHEAST	▼
<input type="checkbox"/>	210034	Schlabach	Tonya	Active	SUNCOAST	▼
<input type="checkbox"/>	209943	Schumann	Tina	Active	SUNCOAST	▼
<input type="checkbox"/>	209707	Schweizer	Cassidy	Active	CENTRAL	▼
<input type="checkbox"/>	209814	Shedd	Ricardo	Active	SUNCOAST	▼
<input type="checkbox"/>	209938	Sheikh	Eduardo	Active	SOUTHERN	▼
<input type="checkbox"/>	209640	Sherwin	Danielle	Active	CENTRAL	▼
<input type="checkbox"/>	209646	Sherwin	Julie	Active	CENTRAL	▼
<input type="checkbox"/>	209720	Shim	Brandi	Active	CENTRAL	▼
<input type="checkbox"/>	209956	Shivers	Jill	Active	NORTHEAST	▼
<input type="checkbox"/>	209952	Shivers	Jillian	Active	CENTRAL	▼
<input type="checkbox"/>	209645	Shumate	Delaney	Active	CENTRAL	▼
<input type="checkbox"/>	209865	Sigala	Alexis	Active	SOUTHEAST	▼
<input type="checkbox"/>	215485	Simulation	Barbie	Active	SUNCOAST	▼
<input type="checkbox"/>	225956	Simulation	Paul	Active	SOUTHERN	▼

To sort data, click inside the header of the variable you are choosing to sort by. Clicking on the header will put the information in ascending order (A-Z; oldest to newest; 1-10) or in descending order (Z-A; Newest to Oldest; 10-1) depending on where you click.

32 Consumers Quick Search Result record(s) returned - now viewing 1 through 15

	iConnect ID	Last Name ▲	First Name	Status	Region	
☐	225915	Santiago	Jorge	Active	SOUTHEAST	▼
☐	210034	Schlabach	Tonya	Active	SUNCOAST	▼
☐	209943	Schumann	Tina	Active	SUNCOAST	▼
☐	209707	Schweizer	Cassidy	Active	CENTRAL	▼
☐	209814	Shedd	Ricardo	Active	SUNCOAST	▼
☐	209938	Sheikh	Eduardo	Active	SOUTHERN	▼
☐	215514	Shell	Sea	Active	CENTRAL	▼
☐	209640	Sherwin	Danielle	Active	CENTRAL	▼
☐	209646	Sherwin	Julie	Active	CENTRAL	▼
☐	209720	Shim	Brandi	Active	CENTRAL	▼
☐	209952	Shivers	Jillian	Active	CENTRAL	▼
☐	209956	Shivers	Jill	Active	NORTHEAST	▼
☐	209645	Shumate	Delaney	Active	CENTRAL	▼
☐	209865	Sigala	Alexis	Active	SOUTHEAST	▼
☐	215485	Simulation	Barbie	Active	SUNCOAST	▼

32 Consumers Quick Search Result record(s) returned - now viewing 1 through 15

	iConnect ID	Last Name ▼	First Name	Status	Region	
☐	209942	Swiger	Katrina	Active	SOUTHERN	
☐	210021	Sweatt	Karen	Active	NORTHWEST	
☐	209961	Sturdivant	Pedro	Active	SUNCOAST	
☐	215837	Studwell	Rip	Active	CENTRAL	
☐	209805	Strachan	Christy	Active	SUNCOAST	
☐	215902	Storm	Brain	Active	SOUTHERN	
☐	209869	Stiltner	Micheal	Active	SOUTHEAST	
☐	209991	Spindler	Krystal	Active	SUNCOAST	
☐	209995	Spindler	Derrick	Active	NORTHWEST	
☐	209999	Spindler	Micheal	Active	NORTHEAST	
☐	209632	Spiers	Raymond	Active	CENTRAL	
☐	209727	Soileau	Kristen	Active	CENTRAL	
☐	225914	Smith	Clare	Active	SOUTHEAST	
☐	215891	Slide	Brock	Active	SOUTHEAST	
☐	215846	Sitter	Tootie	Active	CENTRAL	

List view grids are also found within the Notes and Forms tabs of both the Consumers and Provider Records in iConnect. You can utilize the same sort function in those areas. With this list view grid in the Notes section, you can sort information by Note Date, Note By, Note Type, Description, Status, Date Completed, and Attachments. To sort the information click within the header of the variable you want to sort by:

Note Date	Note By	Note Type	Note Sub-Type	Description	Status	Date Completed	Attachment
10/29/2024	worker_19496, Training	Support Plan		training practices	Pending		Yes
10/29/2024	worker_19496, Training	Support Plan	Documentation	client IP documentations	Pending		Yes

With the list grid view in the Forms tab, you can sort forms by Form (name), Form ID, Review, Review Date, Worker, Division, and Status. To sort the information, click within the header of the variable you want to sort by.

Form	Review	Review Date	Worker	Division	Status
Implementation Plan	Initial	10/29/2024	worker_19496, Training	APD	Complete
Employment Stability Plan (ESP)	As Needed	10/29/2024	worker_19496, Training	APD	Draft

July 1, 2025

FMMIS Provider Interface Updates in iConnect

The Florida Medicaid Management Information System (FMMIS) Provider Interface exchanges provider-related data with iConnect so that both systems have up-to-date and synchronized records for service delivery and billing. Some of the data elements that are updated every night by the FMMIS Provider Interface are as follows:

- Provider Name
- Medicaid ID
- Contact Address
- Email
- Mailing Address

Providers need to edit their information in [FMMIS](#), since the FMMIS Provider Interface will update the Provider's information every night in iConnect. If edits are made directly into iConnect, the FMMIS Provider Interface will override those edits nightly.

FMMIS Provider Interface Data Elements' Location:

Provider Name, Medicaid ID, Contact Address, Email and Mailing Address are located on the **Providers** tab of the Providers record.

MY DASHBOARD | CONSUMERS | **PROVIDERS**

Provider - 19452 (19452)

Workers Services Provider ID Numbers Beds Linked Providers Service Area

Providers CAP EVV Activities EVV Scheduling Forms Contracts Enrollments Authorizations Notes Appointments Credentials

Basic Information

Provider Name	Provider - 19452	Residential Monitor	worker_19452, Training
DBA (if applicable)/Facility Name		Licensing Specialist	worker_19452, Training
Licensed Home licensed for capacity		Area Behavior Analyst	
Active	Yes	Licensed Home/ADT # of workers	
External	Yes	Licensed Facility	
Exclude from Selection	No	Medicaid Provider ID	5678919452
QA Workstream Worker	worker_19452, Training	Provider EIN	12-3456789

Contact Information

Contact Name	Agency Owner	County	Leaon
Street	123 Provider St.	Phone	(850)259-7788
Street 2		Extension	
City	TALLAHASSEE	Fax Number	
State	FL	Email	email@email.com
Zip Code	32301	Website	
Region	NORTHWEST	Cell Phone	(753)222-3456

Mailing Address

Mailing Street	123 Provider St.	Mailing State	FL
Mailing Street 2		Mailing Zip Code	32301
Mailing City	TALLAHASSEE	Mailing Phone	(850)259-7788

September 1, 2025

Choosing the Correct Authorizations in iConnect

When documenting a service rendered, the worker will need to utilize the correct authorization for the service that they provided. It is imperative that the worker knows what service is being rendered. That will come from the agency owner, supervisor, or designee and as identified within the authorization as outlined with the [Individual Budgeting Waiver Services Coverage and Limitations \(iBudget\) Handbook](#).

Please refer to the [iBudget Handbook](#) for further information on the proper documentation type for the service being provided

TIP: When pulling the authorization through the ellipsis (...), click on the plus (+) sign, to bring up all services for the consumer that the provider has an authorization for. Once the service name has been selected, the system will automatically fill in the service code.

The screenshot shows the iConnect interface. On the left, the 'Authorization' section has an ellipsis (...) button with a green arrow pointing to it. Below it, the 'Activity Details' section shows 'Division' as 'APD' and 'Provider' as 'Provider - 19176'. The 'Worker*' field is 'Buffington, Christi'. The 'Activity Services' section shows 'Service *' as 'S5130:UC (4140) Personal Supports'. On the right, a table lists authorizations and services. The table has columns for 'Auth ID', 'Auth Date', 'Provider', 'Start Date', and 'End Date'. Below that, a table lists services with columns for 'Auth Service ID', 'Service Code', 'Service', 'Start Date', 'End Date', 'Max Units', 'Auth Service EDI Status', and 'Max Amount'. The row for 'S5130:UC (4140) Personal Supports' is highlighted in green. At the bottom, there are navigation buttons: 'First', 'Previous', 'Records per page' (set to 15), 'Next', and 'Last'.

Verify that the **Associated Service** matches the **Service** listed in the **Activities Services** section of the provider documentation. Verify that **Documentation Type** is the correct provider documentation type for the service rendered.

The screenshot shows the iConnect interface. The 'Activity Details' section shows 'Division' as 'APD', 'Provider' as 'Provider - 19176', and 'Worker*' as 'Buffington, Christine'. The 'Status' is 'Pending'. The 'Associated Service' is 'Personal Supports' and the 'Documentation Type' is 'Service Log'. The 'Activity Services' section shows 'Service *' as 'S5130:UC (4140) Personal Supports', 'Units *' as '28', 'Rate' as '\$5.47', 'Secondary Code' as 'S5130:UC', and 'Unit Type' as '15 mins'. A green box highlights the 'Status', 'Associated Service', and 'Documentation Type' fields. A green arrow points from the 'Details' link to the 'Documentation Type' dropdown. A black box highlights the 'Documentation Type' dropdown menu, which is open and shows options: 'Annual Report', 'Daily Attendance Logs', 'Monthly Summary', 'Progress Note', 'Quarterly Summary', 'Service Log', and 'Trip Log'. The 'Service Log' option is selected.

Under the **Documentation** row, the worker will select the correct **Provider Documentation Type** from the selection box, utilizing the arrows to move that documentation type(s) to the right side of the empty box.

Activity Details

Division: APD Status: Pending

Provider: Provider - 19176 Associated Service: Personal Supports

Worker*: Buffington, Christine Documentation Type: Service Log

Activity Services

Service *: S5130:UC (4140) Personal Supports Total Cost: \$81.12

Units *: 16

Rate: \$5.07

Secondary Code: S5130:UC

Unit Type: 15 mins

Documentation

Provider Documentation Type *
 Annual Report
 Daily Attendance Log
 Monthly R&B
 Monthly Summary
 Progress Note
 Quarterly Summary
 Service Log

Note

Add service log notes here.

IMPORTANT: If the incorrect Service was selected under the Activity Service, capture the data inputted on the provider documentation record, delete that record and enter a new provider documentation entry with the data captured along with the correct service.

The provider documentation below is an example of a provider documentation that would need to be reentered. The Secondary Code matches the code for Life Skills Development 1; however, the Service listed is Personal Supports Day. This occurred due to the incorrect Service being selected originally and then updated within the same provider documentation. To remediate, the user will need to capture the data in the provider documentation, delete that provider documentation and then add a new provider documentation with the correct information.

The services code does not match Personal Supports.

Authorization

Auth ID: [REDACTED] PA Number: [REDACTED]

Activity Details

Division: APD EVV Violation(s)?

Provider: [REDACTED] Unresolved EVV Violation(s)?

Worker*: [REDACTED] Associated Service: Life Skills Development 1

Status: Complete Documentation Type: Service Log

Services

Service *: S5130:UC:SC (4141) Personal Supports - Day Total Cost: \$112.60

Units *: 20

Rate: \$5.63

Secondary Code: S5135:UC **S5135:UC**

Unit Type: 15 mins

1 Consumers Provider Documentation record(s) returned - now viewing 1 through 1

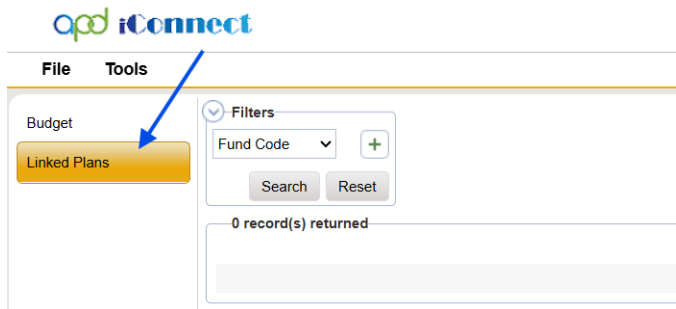
Activity ID	Date	Worker	Provider	Service Code	Units	Status	Associated Service	Documentation Type
[REDACTED]	05/08/2025	[REDACTED]	[REDACTED]	S5135:UC	20.00	Complete	Life Skills Development 1	Service Log

v8.8.15 About

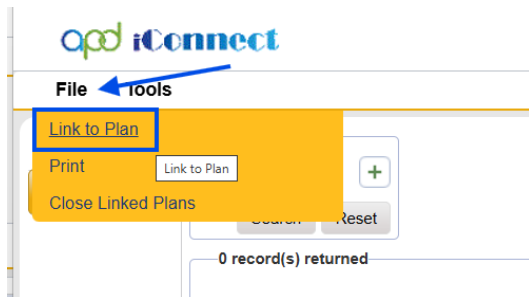
Opening Plans from the Consumer Budgets tab – WSC Edition

WSCs are responsible for keeping their client's Planned Services up to date along with the corresponding authorizations. Making updates to the Planned Services require linking and unlinking of the budget to the Plan with those Planned Services. After the budget has been relinked to the Plan, the WSC will need to navigate back to the Plan to complete the necessary tasks for validation and approval. This helpful tip will save the WSC a click or two in getting back to the client's Plan after the Budget was unlinked.

1. The WSC is in the Consumer Budgets tab and the Linked Plan bookmark.



2. Navigate to **File** and select **Link to Plan**.

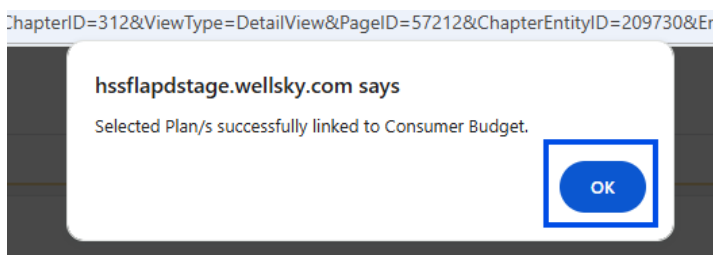


3. Navigate to the appropriate plan from the list view grid and utilize the caret click **Link**.

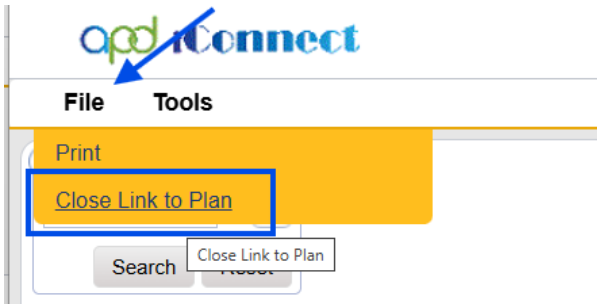
The screenshot shows a list view grid of plans. The grid has columns for Fund Code, Program, Plan Start Date, Plan End Date, Worker, Status, and Fiscal Year. A blue arrow points to a 'Link' button in the rightmost column of the first row.

Fund Code	Program	Plan Start Date	Plan End Date	Worker	Status	Fiscal Year	
APD	APD Waiver	07/01/2025	06/30/2026	Buffington, Christine	Pending	2026	Link
APD	APD Waiver	07/01/2024	06/30/2025		Approved	2025	Link

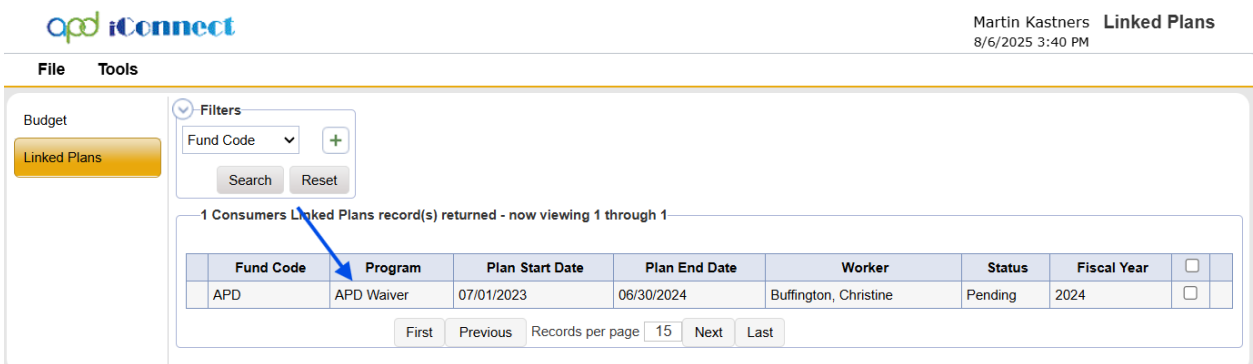
4. Press **OK** to acknowledge that the Plan was linked.



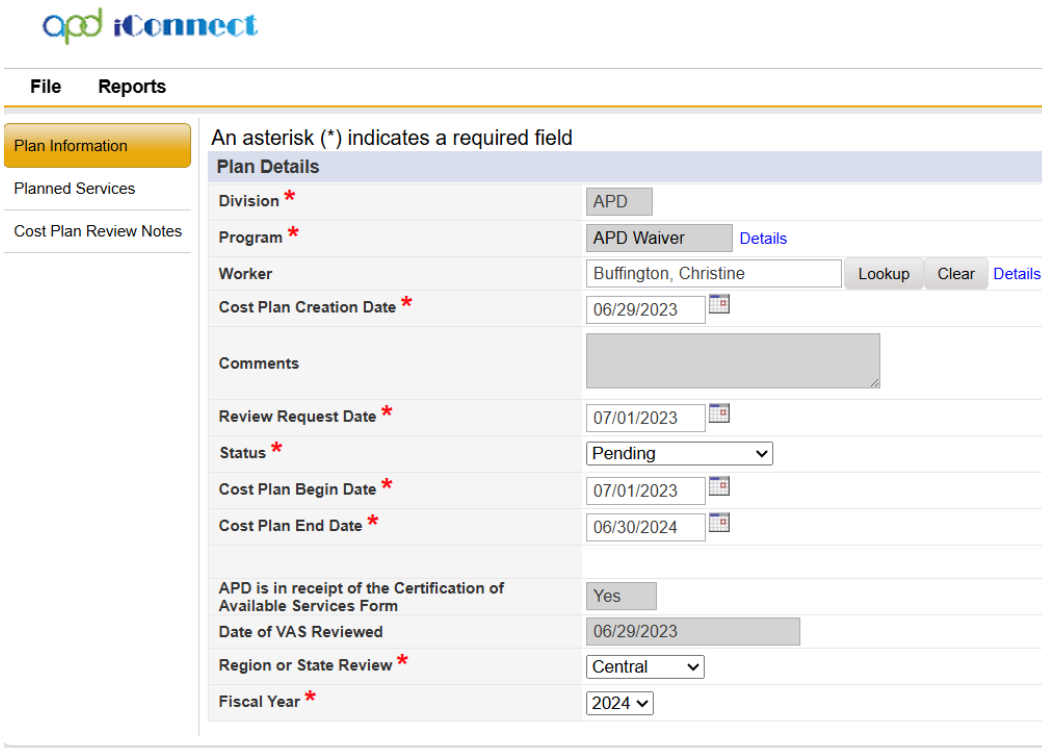
5. Go to **File** and select **Close Link to Plan**.



6. The plan that was linked will be displayed. Click on the plan from that list view grid.



7. The Plan Information will display, and additional edits can be made for the approval and Plan Validation process.



October 1, 2025

Reviewing Provider Documentation

The Service Provider Documentation Report can assist agency owners and their delegates in reviewing provider documentation that has been submitted through iConnect for services that were rendered by their agency. Utilizing the Service Provider role allows the user to view the provider documentation for all workers from their agency. The Service Provider Worker role will allow the user to pull a report to show the documentation which the user submitted through iConnect.

The Service Provider Documentation Report contains the following information:

(Please review the [Service Provider Documentation Report Job Aid](#) for any updates to the report.)

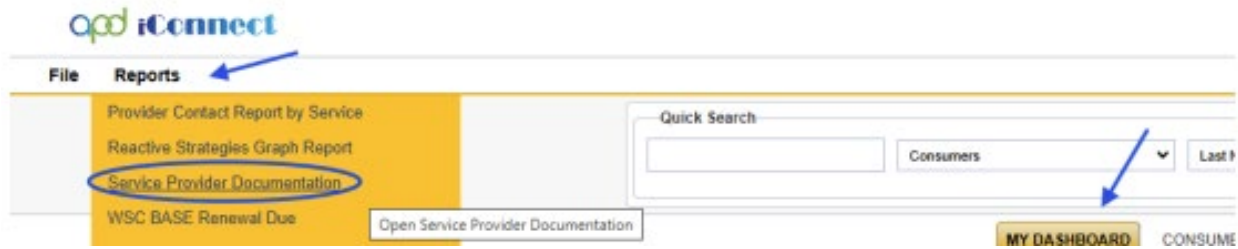
- Region of the consumer
- Consumer's iConnect ID
- Consumer's name
- Primary Worker's name (the name of the Waiver Support Coordinator (WSC))
- WSC QO's name (the Qualified Organization that employs the WSC)
- PA Number
- Service Code
- Service Name
- Activity Time Entries (number of entries for that service on the same provider documentation)
- Activity ID (unique code for that activity entry)
- Provider Documentation Worker Name
- Start Date/Time
- End Date/Time
- Total Minutes
- Units Approved (total units approved from the authorization)
- Units used This Activity
- Total Unites Used (includes total units used for that current authorization)
- Balance Units (number of units that remain, in order from the entry date of the provider documentation, not the rendered date)
- Unit Type
- Provider Documentation Type
- Provider Documentation Notes
- Follow-Up (For WSC Progress Notes)
- EVV Delivery Type (Manual Entry or Mobile App Upload will be indicated here)
- Delivered Via EVV

1. To begin, log into iConnect and set Role = Service Provider or Service Provider Worker, as applicable. Click **Go**.

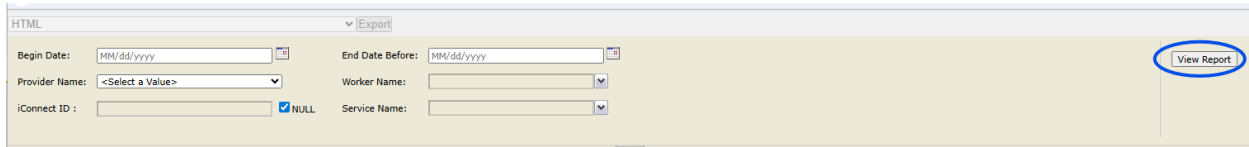


The screenshot shows the top navigation bar of the iConnect dashboard. On the left, there are links for "My Dashboard" and "Sign Out". On the right, there is a "Role" dropdown menu currently set to "Service Provider". A blue arrow points to the "GO" button, which is circled in blue.

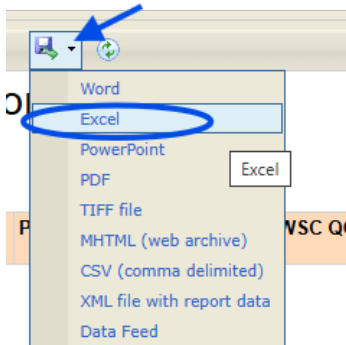
2. On My Dashboard, navigate to the **Reports** menu and select Service Provider Documentation.



3. Fill out the search screen with the information needed for the report. **It is crucial that the information is filled out left to right, top to bottom.** Click **View Report** to execute the search.



4. A report will be generated on the screen. View the report in this window or export the report. To export the report, click the caret next to the save icon. Select **Excel**.



5. For more details on how to pull the Service Provider Documentation Report, please review the [Service Provider Documentation Report Job Aid](#) and for instructions on how to sort and filter an iConnect Excel Report please review [How to Add Filters to iConnect Reports Job Aid](#).

REMINDER: Personal Health Information (PHI) will be pulled when exporting the Service Provider Documentation Report. It is the responsibility of all iConnect users to ensure that their systems follow all HIPAA requirements.

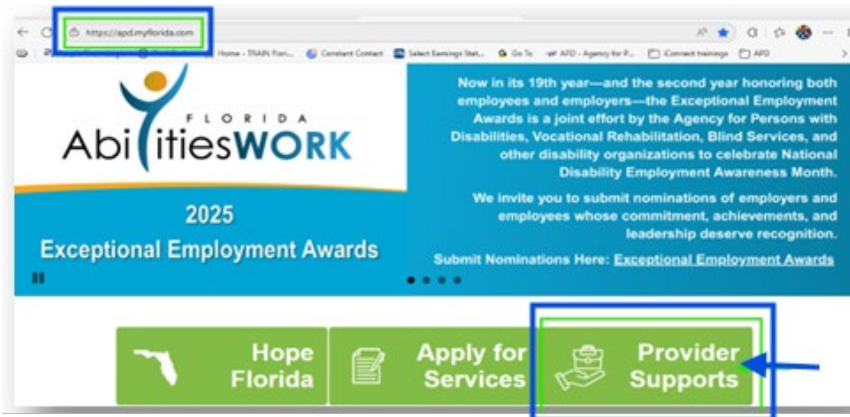
November 1, 2025

How do I locate the most current manuals and job aids for iConnect?

Do you hear the Regional iConnect trainers say, “Let’s go look at the manual,” but are not certain how they get there so quickly?

Manuals and job aids have been created to assist providers with workflows and procedures in iConnect. At times they are updated to illustrate enhancements made to iConnect. Services have specific manuals or job aids that are located and updated on the APD’s website.

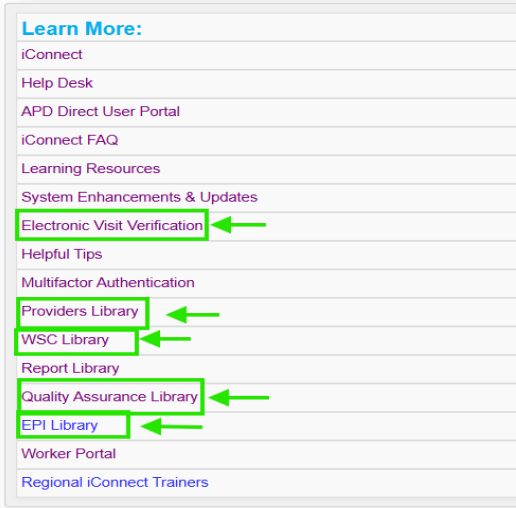
1. On APD website, apd.myflorida.com
2. Locate the **Provider Supports** link and click on it



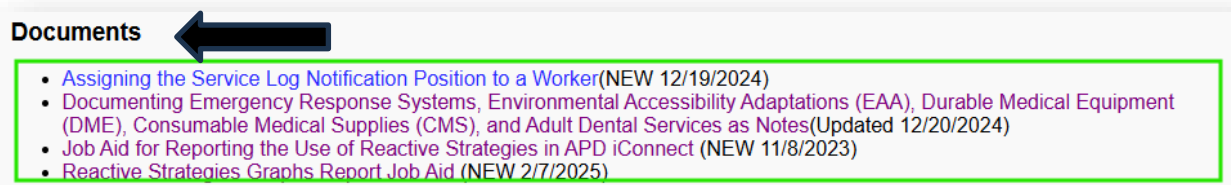
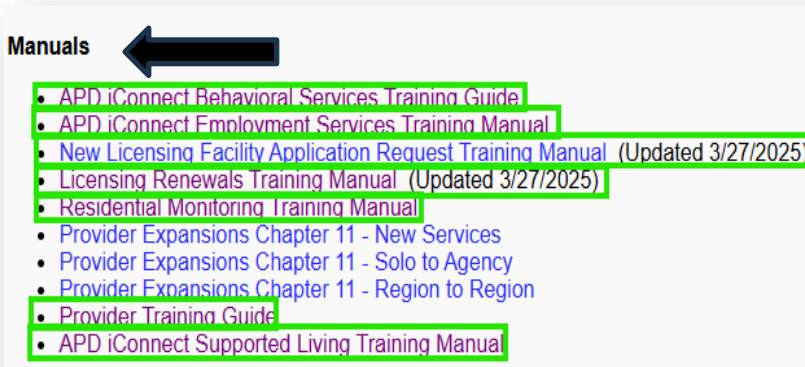
3. Then select **APD iConnect**



4. Locate the **Library** that is applicable for the services provided (Providers Library shows all manuals and job aids for services outside of Waiver Support Coordination [WSC]).



5. Navigate to the **Manuals or Documents** and select the topic that you are interested in, and click on it

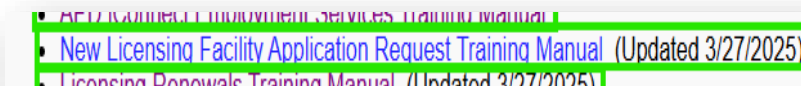


Check for updated material

to make sure that you are using the most current manual or job aid.

How to locate the updated manuals and job aids

1. Located beside the document, you may see (Updated X/XX/XXXX). This will indicate the most recent update to the document.



2. Additionally, In the manuals there are Table of Contents, you may see the following to assist the user in locating where the updates were made.

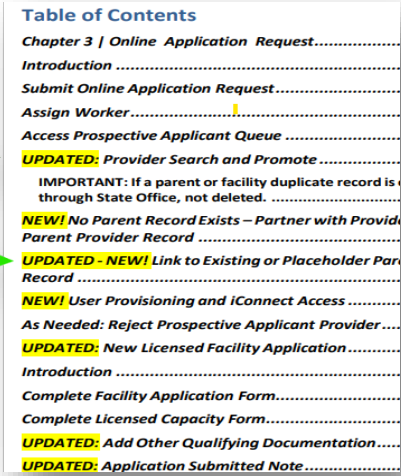


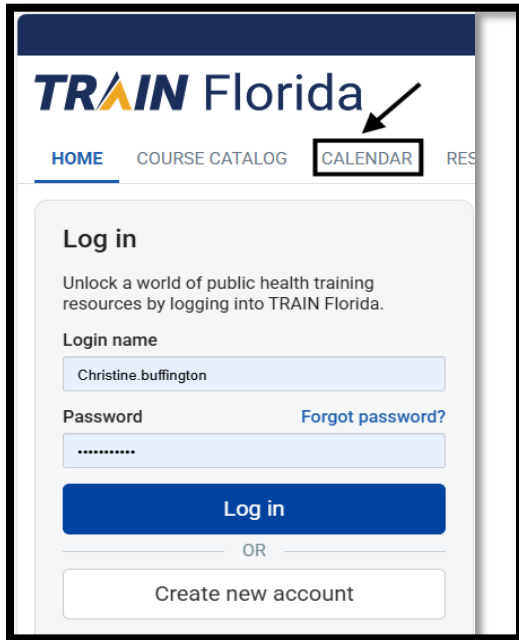
Table of Contents	
Chapter 3 Online Application Request.....	
Introduction	
Submit Online Application Request.....	
Assign Worker.....	
Access Prospective Applicant Queue	
UPDATED: Provider Search and Promote	
IMPORTANT: If a parent or facility duplicate record is through State Office, not deleted.	
NEW! No Parent Record Exists – Partner with Provider Parent Provider Record	
UPDATED - NEW! Link to Existing or Placeholder Parent Record	
NEW! User Provisioning and iConnect Access	
As Needed: Reject Prospective Applicant Provider.....	
UPDATED: New Licensed Facility Application.....	
Introduction	
Complete Facility Application Form.....	
Complete Licensed Capacity Form.....	
UPDATED: Add Other Qualifying Documentation.....	
UPDATED: Application Submitted Note.....	

December 1, 2025

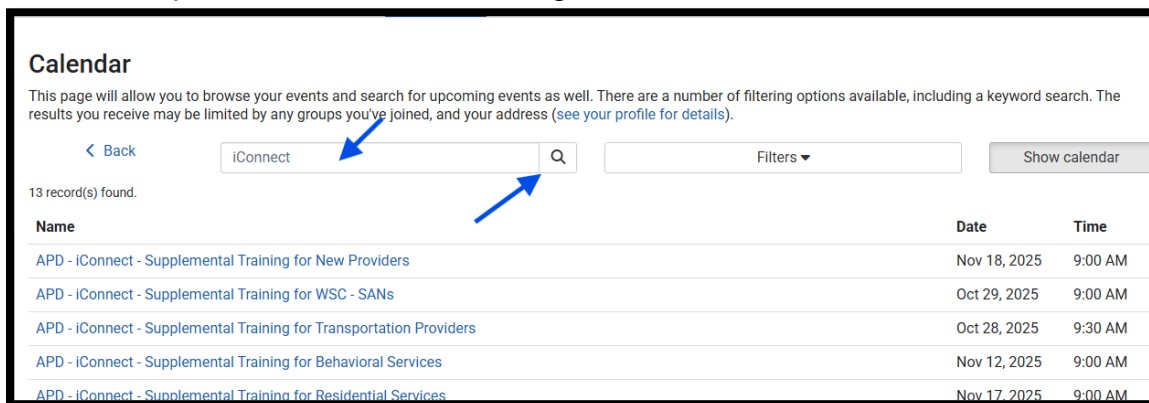
How can I find TRAIN Florida courses using the calendar?

There are several ways to locate an iConnect live training. One lesser-known option is to search for specific topics using the TRAIN Florida's calendar, which displays only scheduled training events.

1. Log into TRAIN Florida at www.train.org.
2. Click **Calendar** from the navigation bar.



3. In the search bar, type in the topic name and click the search icon. In the example below, we are searching for iConnect.



4. Select the topic.

i connect new provider 1 2

Filters ▾

Show calendar

32 record(s) found.

Name	Date	Time
APD - iConnect - Supplemental Training for New Providers 3	Oct 21, 2025	9:00 AM
APD - iConnect - Supplemental Training for Provider EVV Managers	Oct 14, 2025	1:30 PM

5. Once the course is selected, the description of the course will be displayed along with the upcoming dates that the training will be offered.

All sessions Show past sessions

Oct 21, 2025 9:00 AM EDT - 5:00 PM EDT

[+ Register](#) APD Office - Jacksonville (119.2 miles away) (11 seats available) ▾

Registration Deadline
Oct 16, 2025 11:59 PM EDT

Nov 19, 2025 9:00 AM EST - 4:00 PM EST

[+ Register](#) APD - Central - iConnect - Virtual (15 seats available) ▾

Registration Deadline
Nov 14, 2025 11:59 PM EST

6. Click **Register** on the session to register for the course and remember to add it to your calendar.

MH Margaret Halle
Margaret.Halle@apdcares.org
3862384714

21
OCT
2025

APD Office - Jacksonville : **Building A** (119.2 miles away)
3631 Hodges Blvd.
Jacksonville, Florida
United States 32224

[\(map\)](#)

Contact: Margaret Halle
Margaret.Halle@apdcares.org
9:00 AM EDT - 5:00 PM EDT

[Add to Personal Calendar](#)



Reminder, you are welcome to register for courses beyond what your region offers. Please make sure to double-check the time, as part of our state is in the Central Time Zone. If you cannot attend a training that you have registered for, please withdraw from the session to allow others to register.

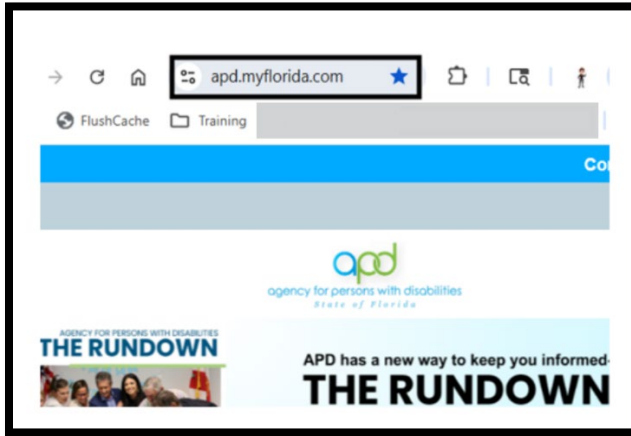
January 1, 2026

Report Library in iConnect

Happy New Year! We are thankful and appreciate all the work that you do for our clients.

Did you know that we have a library just for **Report Job Aids**? All the iConnect report job aids are in one centralized location to make finding them simple.

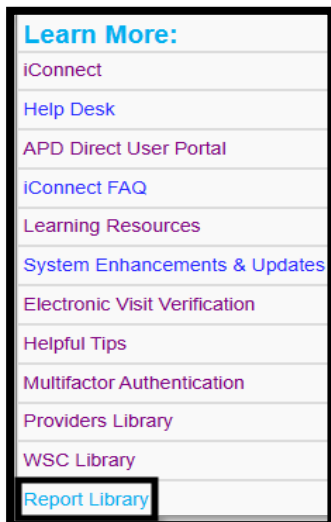
1. To locate the Report Library, navigate to the APD website: <https://apd.myflorida.com>.



2. Hover over the link for **Provider Supports** at the top of the page and click on **iConnect**.



3. Select **Report Library**.



4. Report Library

This library contains instructions for users to access and use reports from iConnect, listed by iConnect user role.

- For example, reports in the section WSC/CDC Role Reports can only be accessed by users with that particular role.

WSC/CDC Role Reports

- [How to Add Filters to iConnect Reports Job Aid \(8/8/2024\)](#)
- [Provider Contact Report by Service Job Aid \(New 12/19/2024\)](#)
- [WSC Caseload Report Job Aid \(4/24/2025\)](#)
- [WSC BASE Renewal Due Report Job Aid \(7/26/2024\)](#)
- [WSC Medicaid Waiver Eligibility Worksheet Due Report Job Aid \(7/26/2024\)](#)
- [WSC Provider Documentation Report Job Aid \(6/28/2024\)](#)
- [WSC Support Plan Due Report Job Aid \(6/28/2024\)](#)
- [How to Pull Cost Plan Reports in iConnect Job Aid \(6/26/2024\)](#)

Qualified Organization Owner in Service Provider Role Reports

- [Service Provider Documentation Report Job Aid \(3/27/2025\)](#)
- [How to Add Filters to iConnect Reports Job Aid \(New 8/8/2024\)](#)
- [WSC Caseload Report Job Aid \(4/24/2025\)](#)
- [Provider Contact Report by Service Job Aid \(12/19/2024\)](#)
- [WSC BASE Renewal Due Report Job Aid \(7/26/2024\)](#)
- [WSC Support Plan Due Report Job Aid \(6/28/2024\)](#)
- [WSC Medicaid Waiver Eligibility Worksheet Due Report Job Aid \(7/26/2024\)](#)

Service Provider Reports

- [How to Add Filters to iConnect Reports Job Aid \(8/8/2024\)](#)
- [Provider Service Authorization Data Report Job Aid \(New 5/29/2025\)](#)
- [Reactive Strategies Graphs Report Job Aid \(2/7/2025\)](#)
- [Service Provider Documentation Report Job Aid \(3/27/2025\)](#)

5. Select the appropriate job aid to assist with accessing the desired report.

6. Each section has a job aid to provide direction on how to add filters to reports from iConnect.

WSC/CDC Role Reports

- [How to Add Filters to iConnect Reports Job Aid \(8/8/2024\)](#)
- [Provider Contact Report by Service Job Aid \(New 12/19/2024\)](#)
- [WSC Caseload Report Job Aid \(4/24/2025\)](#)
- [WSC BASE Renewal Due Report Job Aid \(7/26/2024\)](#)
- [WSC Medicaid Waiver Eligibility Worksheet Due Report Job Aid \(7/26/2024\)](#)
- [WSC Provider Documentation Report Job Aid \(6/28/2024\)](#)
- [WSC Support Plan Due Report Job Aid \(6/28/2024\)](#)
- [How to Pull Cost Plan Reports in iConnect Job Aid \(6/26/2024\)](#)

Qualified Organization Owner in Service Provider Role Reports

- [Service Provider Documentation Report Job Aid \(3/27/2025\)](#)
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- [WSC Caseload Report Job Aid \(4/24/2025\)](#)
- [Provider Contact Report by Service Job Aid \(12/19/2024\)](#)
- [WSC BASE Renewal Due Report Job Aid \(7/26/2024\)](#)
- [WSC Support Plan Due Report Job Aid \(6/28/2024\)](#)
- [WSC Medicaid Waiver Eligibility Worksheet Due Report Job Aid \(7/26/2024\)](#)

Service Provider Reports

- [How to Add Filters to iConnect Reports Job Aid \(8/8/2024\)](#)
- [Provider Service Authorization Data Report Job Aid \(New 5/29/2025\)](#)
- [Reactive Strategies Graphs Report Job Aid \(2/7/2025\)](#)
- [Service Provider Documentation Report Job Aid \(3/27/2025\)](#)

March 1, 2026

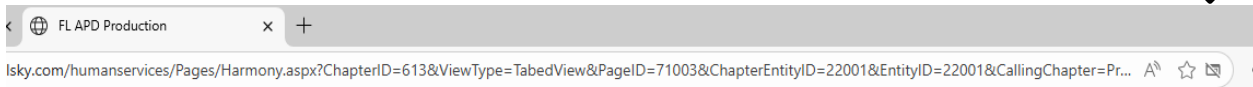
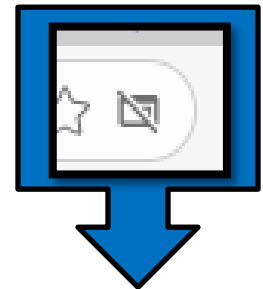
Disabling Pop-Up Blockers

Did you know that pop-ups do not only refer to restaurants or stores but also to screens on most web browsers? While pop-ups can at times be an annoyance, blocking all pop-ups on all web sites will cause crucial screens to not display in iConnect, such as:

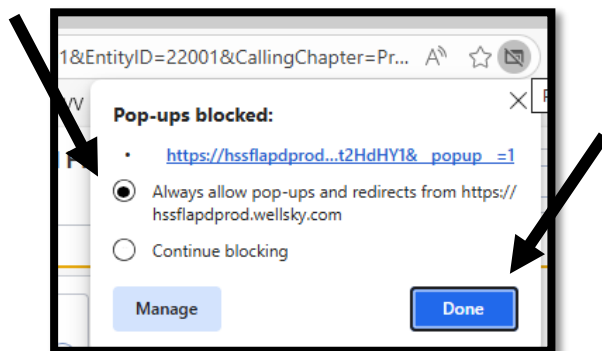
1. Linked Providers
2. Search Screens
3. Notifications
4. Alerts
5. Plan Validation Report
6. New SAN
7. New Planned Service

Allowing Pop-ups on iConnect

1. When a screen does not display as intended, verify there is a pop-up displayed box on the web address bar. Click the pop-up disabled icon.

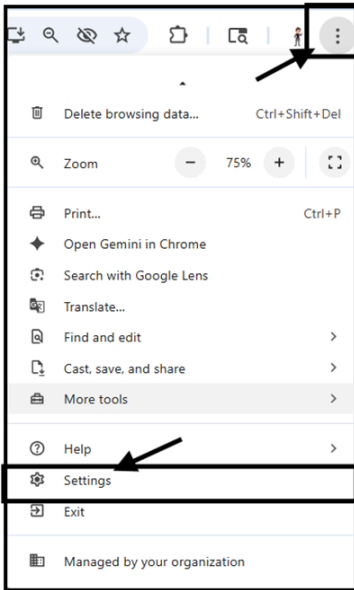


2. The **Pop-ups blocked** screen will display. Select the option to always allow pop-ups and redirects. Then click **Done**.

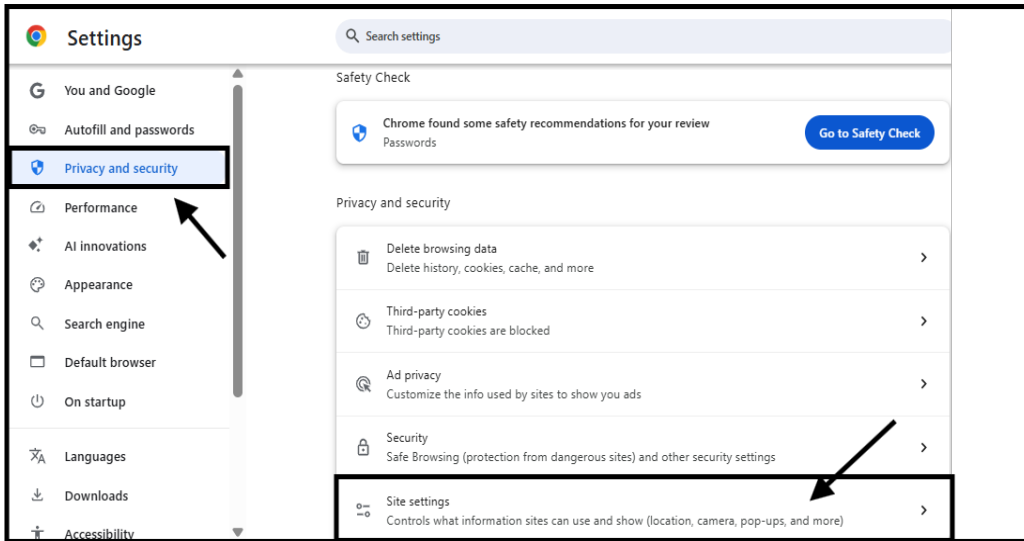


Manage Pop-ups in the Google Chrome web browser

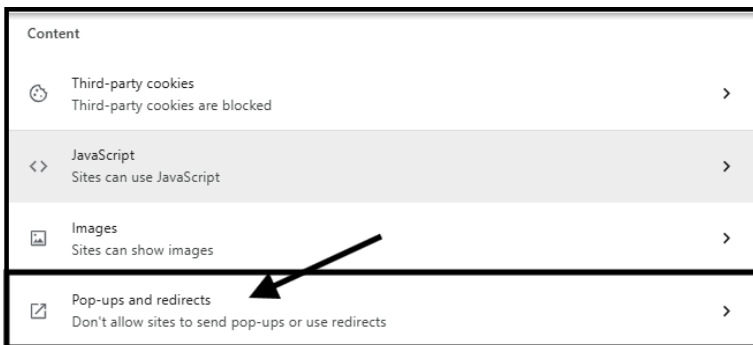
1. To manage pop-ups in the Chrome web browser, open Chrome, navigate to the three dots on the far right. Select **Settings**.



2. In settings, go to **Privacy and security** on your left and then select **Site settings**.



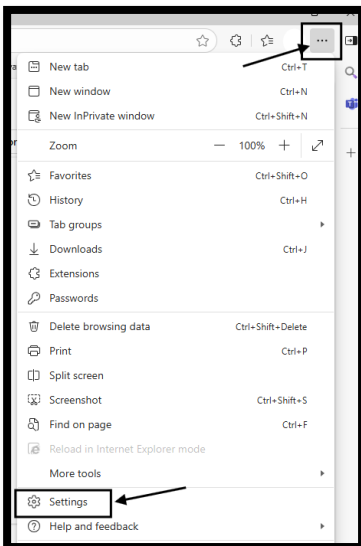
3. Scroll down and click **Pop-ups and redirects**. Verify that <https://hssflapdprod.wellsky.com> is listed.



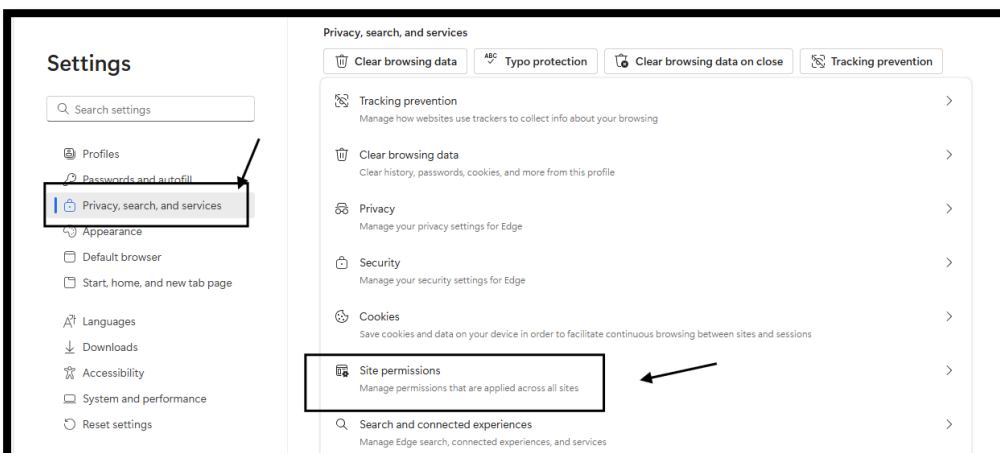


Manage Pop-ups in the Microsoft Edge web browser

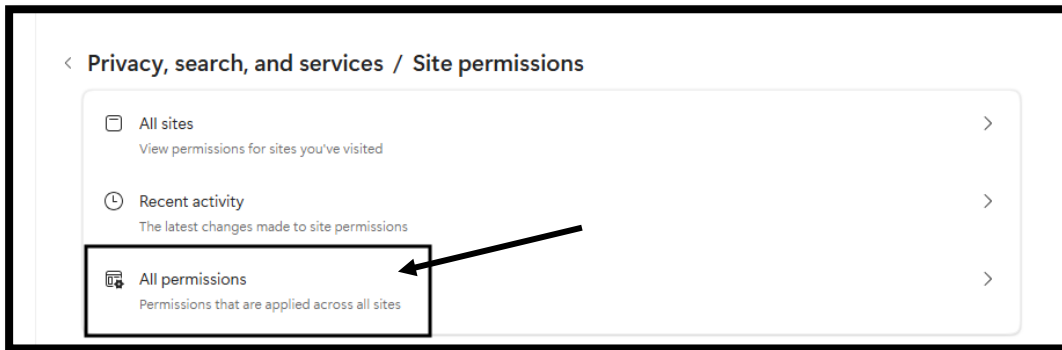
1. To manage pop-ups on the web browser, once the web browser is open navigate to the three dots on the far right. Select **Settings**.



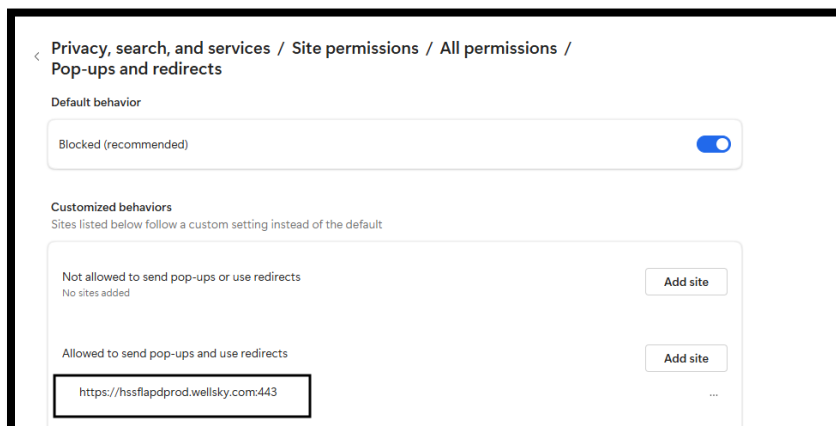
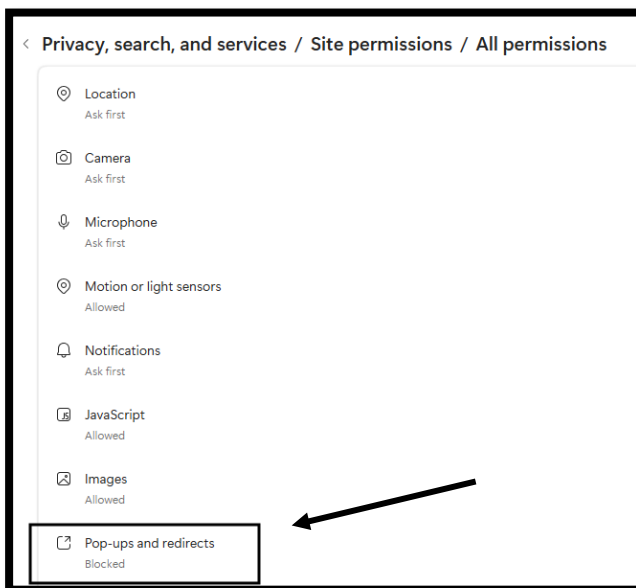
2. In settings, go to **Privacy, search, and services** on your left and then select **Site permissions**.



3. Select All permissions.



4. Scroll down and select **Pop-ups and redirects**. Verify that <https://hssflapdprod.wellsky.com> is listed.



Clearing your Cache

If you are experiencing computer issues or your system seems to be slow, one of the first things we will ask is “**have cleared your cache?**”.

Why should you clear your cache?

- **Fix website issues:** A cache can store old files for a website. Clearing it can fix formatting or loading problems if the data on the cached version is outdated.
- **Improve performance:** A cache that is too full can slow down your browser. Clearing it frees up resources and can make your browser run more smoothly.
- **Free up storage space:** Cache files, especially for apps and streaming services, can take up a significant amount of storage over time.
 - It is important to first upload any EVV activities or Worker Portal Forms not yet downloaded onto iConnect currently stored on your device prior to clearing the cache.
 - Clearing cache will cause those items to be deleted from the device and unable to be uploaded to iConnect.
- **Troubleshooting:** Clearing the cache is a standard in troubleshooting to rule out any other issues.

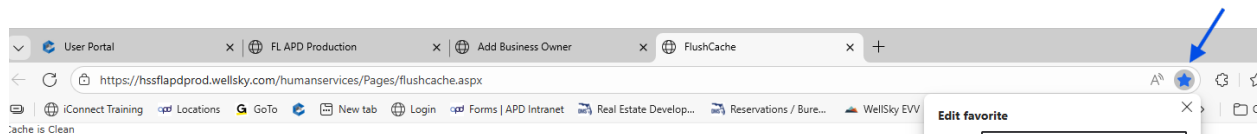
So, how do you clear your cache?

1. Close all the open browsers and windows.
2. Use this link, [AzureFlushCache](https://hssflapdprod.wellsky.com/humanservices/Pages/flushcache.aspx), to clear your system for iConnect.
3. Alternatively, you can copy and paste this web address and save it as a bookmark or favorite for future use:

<https://hssflapdprod.wellsky.com/humanservices/Pages/flushcache.aspx>

To Bookmark or save to favorites:

- a. Depending on the browser used, click the star icon.
- b. Name the link, so it is easily identified by the user.
- c. Click **Done** when finished.



April 1, 2026

Changing your APD Password

When it is time to update your CyberArk password for iConnect access, a notification like the example shown below will display on your user portal once logged into CyberArk.



Follow these steps to complete the password change:

1. Click the word [here](#) on the notification.



2. The "Change Your Password" screen will appear.

A screenshot of a "Change Your Password" dialog box. It has a title bar with a close button (X). Below the title are three input fields: "Current Password" with a red asterisk, "New Password" with a red asterisk and an information icon, and "Confirm New Password" with a red asterisk. At the bottom are "OK" and "Cancel" buttons. The "Current Password" field contains a series of dots.

3. Enter your current password.
4. Create a new password that includes the following:
 - a. At least 8 characters long
 - b. Includes characters from at least 3 of these types
 - i. Upper case (A-Z)
 - ii. Lower case (a-z)
 - iii. Digits (0-9)
 - iv. Special characters (@#\$\$%^&, etc.)

At least 8 characters long, and includes characters from at least 3 of these character types: UPPER (A-Z), lower (a-z), digits (0-9), others (@#\$\$%^&, etc.)

5. Enter and confirm your new password, then click **OK**.

Change Your Password [X]

Current Password *

.....

New Password * ⓘ

.....

Confirm New Password *

.....

OK Cancel

6. If the above requirements aren't met or your passwords don't match, you'll receive a notification similar to below.

Change Your Password [X]

Error [X]

Password update failed. Please make sure the password meet the complexity requirements. Password must comply with your AD password policy.

[Show Error Details](#)

Close

OK Cancel

Change Your Password [X]

Current Password *

.....

New Password * ⓘ

.....

Confirm New Password *

.....

OK Cancel

Passwords do not match.

7. Re-enter your new password, ensuring that you have included all the elements required, and click **OK**.
8. Once your new password has been successfully updated, you will receive a confirmation email. The email reads as follows:



Password change confirmation

This message confirms that the password for the account associated with this email address has been changed.

If you did not make this password change, please **immediately report this to APD Information Security**

By email:
security@apdcares.org

By phone call to the APD Help Desk:
(833) 400-3420

For additional information on how to change your password in CyberArk, refer to [Self-Service Password Resets in CyberArk job aid.](#)