

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 logo 'apd iConnect' is visible on the left, and the user's role is set to 'Service Provider' on the right. The main navigation bar includes 'MY DASHBOARD', 'CONSUMERS', and 'PROVIDERS'. The current view is for 'Provider - 18915 (18915)'. A secondary window is overlaid on the main page, showing a 'Worker' record for 'Provider - 18915'. The worker's details include: Member ID: 2427, Last Name: Shorter, First Name: Caroline, and Title: Provider - 18915. The 'Title' field is circled in blue, and an arrow points to it from the right. Other fields include Business Address, Business Address 2, City, State, and Zip Code.

## 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  
Last Updated by caroline.shorter@apdcares.org  
at 2/15/2024 8:37:08 AM

Provider Documentation

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

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 evvinfo.team@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

Activity Details

257503 Consumer First Name \* Holly

iConnect ID 209648 Consumer Last Name \* Bohi

### 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

Division: APD

Provider: Simulation, Behavior

09/19/2023

qpd iConnect  
 Blonde Simulation  
 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

Worker \* Shorter, Caroline  
 Status \* Complete  
 Provider/Program \* HelloFreshly  
 Approved Date 02/15/2024

qpd iConnect  
 Blonde Simulation  
 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 Contains Legal Representative AND  
 Note Date +  
 Search Reset

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

File

Filters

Ticker Name  Contains  AND

iConnect ID

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
---------------	-------------	--------------	--------------	----------	----------------	--------	-------------

### 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  Last

**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@opdncs.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
<a href="#">MOCK DOC.docx</a>	PCSP Jan 2023		

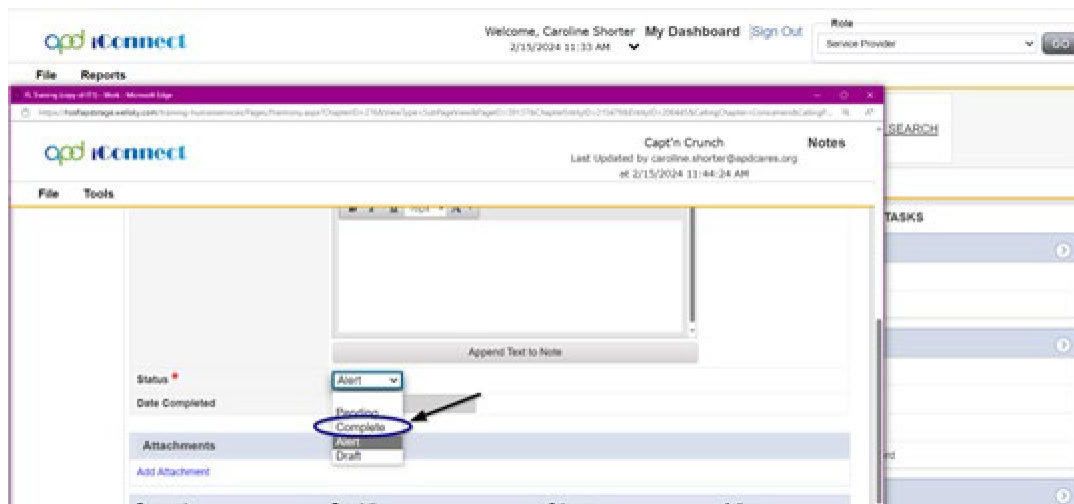
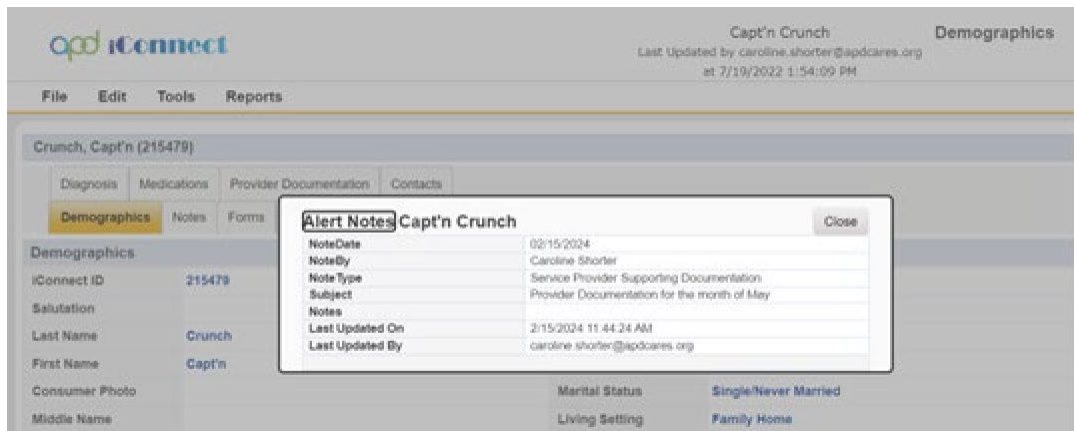
Note Recipients

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?**

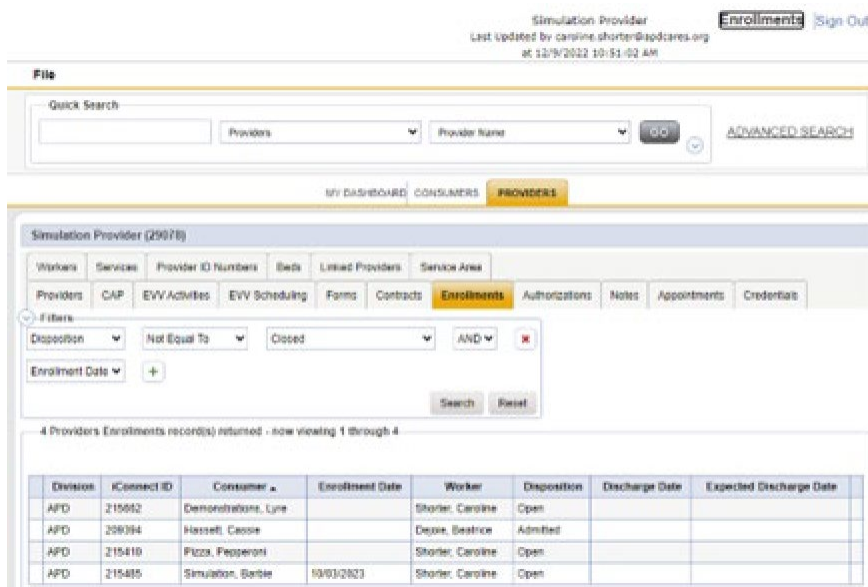
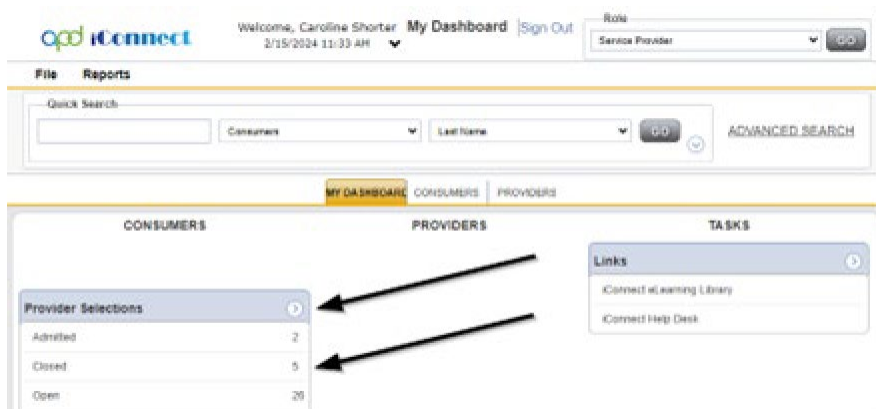
Do you see an Alert Note pop-up every time you open a consumer's record? Evaluate the Note to see if it is for a consumer death or change in WSC. If it is not for either of those cases, then the Note needs to be updated to "Complete" Status. This update be completed by all roles. If you are unsure if 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 <a href="#">Details</a>
Note Type *	Supported Living
Note Sub-Type	Signed Implementation Plan
Description	Signed Implementation Plan
Note	On 2/19/2024 at 10:04 AM, Sylvia Provider wrote: Notes
Status *	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 <a href="#">Details</a>
Note Type *	Supported Living
Note Sub-Type	Signed Implementation Plan
Description	Signed Implementation Plan
Note	On 2/19/2024 at 10:04 AM, Sylvia Provider wrote: Notes
Status *	Complete
Date Completed	02/19/2024
Provider Referral Response	
Referred Provider	
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		<a href="#">Remove</a>
Baer, Sylvia	08/30/2022	02/19/2024	Read		
Baer, Sylvia	2/19/2024		Unread		<a href="#">Remove</a>

## 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 right, it says "Welcome, Caroline Shorter" and "Ticklers 3/8/2024 2:44 PM". Below the header is a "File" section with a "Filters" panel containing dropdowns for Status, Equal To, New, AND, and a search bar. The main area displays a table of ticklers with columns: Consumer Name, iConnect ID, Tickler Name, Date Created, Date Due, Date Completed, Status, and Assigned To. A context menu is open over the "Status" column of the first row, showing options: Cancel, Complete, and View Consumers Record. Arrows point from the text above to the context menu options.

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
<a href="#">APDiConnectTherapeuticProviderScript.pdf</a>	27 Feb 2023
<a href="#">APDiConnectTherapeuticSimulationAid.pdf</a>	8 Feb 2024
<a href="#">ProviderDocumentationJobAid.pdf</a>	8 Feb 2024
<a href="#">AssessmentsJobAid.pdf</a>	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

**B I U 16px A ▾**

Note

Status \*  
Date Completed

**Attachments**

[Add Attachment](#)

Attachments Grid

Document	Description	Category	Action
----------	-------------	----------	--------

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

**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
Steph, Linda		
Steph, Linda	Customer Service Manager	916-520-6800
Steph, Linda		
Steph, Linda		

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.

Activity ID	Date	Worker	Provider	Service Code	Units	Status	Associated Service	Documentation Type
22897	01/26/2024	Ramon Montequiu, Esq.	MAWS-Ran High LLC	8000-0126	1.00	Pending		
22898	02/01/2024	Ramon Montequiu, Esq.	MAWS-Ran High LLC	12023-01 AP	1.00	Pending		
22922	01/08/2024	Ramon Montequiu, Esq.	SUZY QUALIFIED ORGANIZATION	80012-01	0.25	Pending		Program Note
22925	01/02/2024	Ramon Montequiu, Esq.	MAWS-Ran High LLC	8000-0126	1.00	Pending		
22924	01/01/2024	Ramon Montequiu, Esq.	MAWS-Ran High LLC	12023-01 AP	1.00	Complete		
22915	12/07/2023	Ramon Montequiu, Esq.	MAWS-Ran High LLC	12023-01 AP	1.00	Complete		
22900	12/01/2023	Ramon Montequiu, Esq.	MAWS-Ran High LLC	8000-0126	1.00	Complete		
22899	12/06/2023	Ramon Montequiu, Esq.	MAWS-Ran High LLC	8000-0126	1.00	Complete		
22897	12/18/2023	Ramon Montequiu, Esq.	MAWS-Ran High LLC	12023-01 AP	1.00	Complete		
22897	12/18/2023	Ramon Montequiu, Esq.	MAWS-Ran High LLC	8000-0126	1.00	Complete		

Attachments

[Add Attachment](#)

Attachments Grid

Document	Description
Supporting Documentation	

Downloads

Supporting Documentation (1)

[Open File](#)

[Open File](#)

[Open File](#)

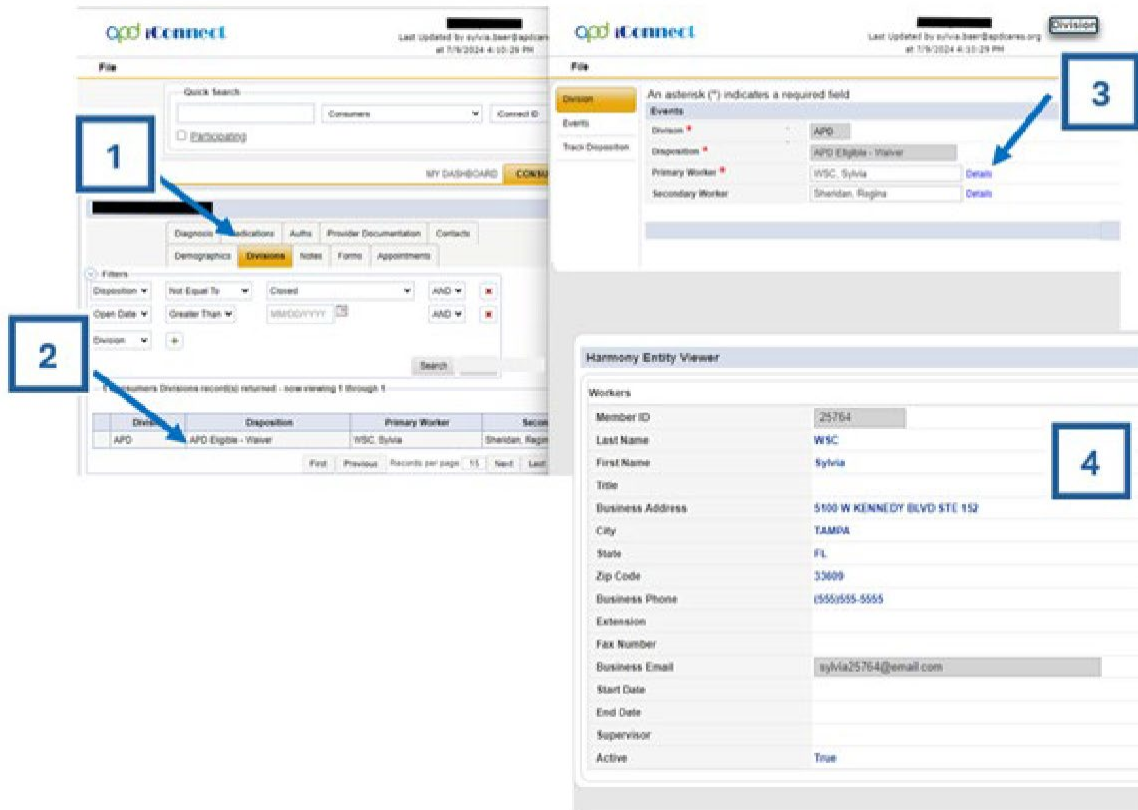
[Open File](#)

**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.



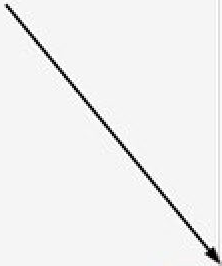
## Characters Available on Form Text Fields in iConnect

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 *	Annual Report Daily Attendance Log Monthly R&B Monthly Summary Progress Note Quarterly Summary Service Log	Note	<input type="text"/>
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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.

opod itconnect

CC

Site: Tampa, FL

Department: APD Employee

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.

opod itconnect

Simulation, Barbie (215488)

File Edit Tools Reports **Ticklers** Word Merge

Quick Search: Consumers Last Name

ADVANCED SEARCH

Simulation, Barbie (215488) Ticklers Detail

An asterisk (\*) indicates a required field

Manual Tickler

Tickler: Self Generated Reminder

Qualify: Qualify

Date Due: 06-08-2024

Assigned To: Shorter, Caroline

Message: Victim - Qualify

## 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, Due Date, 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 web application interface. At the top, there's a navigation bar with the iConnect logo and user information. Below that, there's a 'File' section with a sidebar on the left containing 'File Reports', 'Open', 'WSC - Selected', 'Notes', 'Complete', and 'Ticklers'. The main area features a 'Filters' box with dropdowns for 'Status', 'Equal To', 'New', and 'AND', along with an 'iConnect ID' field and a 'Search' button. Below the filters, a table displays tickler records. An arrow points to the 'Tickler Name' column header, which has a small downward arrow indicating it is currently selected for sorting.

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.

This close-up screenshot shows the 'Filters' dropdown menu. The menu is open, displaying a list of sorting options: 'Status', 'iConnect ID', 'Tickler Name', 'First Name', 'Last Name', 'Date Created', 'Date Due', 'Date Completed', and 'Assigned To'. An arrow points to the 'Date Due' option, which is currently selected and highlighted. Below the menu, a table shows tickler records with columns for 'Consumer Name', 'iConnect ID', 'Tickler Name', 'Date Created', and 'Date Due'. The 'Date Due' column header has an upward arrow, indicating it is sorted by date due.

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

**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 'Last Updated by caroline.shorter@apdcare.org at 2/13/2024 8:37:08 AM'. A 'Provider Documentation' tab is active. The 'File' menu is open, showing options: '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, and an arrow points to it from the text below. The background shows a form with fields for 'Start Time' (1:00 PM), 'End Date \*' (08/25/2023), 'End Time' (2:00 PM), and 'Total Minutes' (60). Below this is the 'Activity Details' section with 'Division' (APD), 'Provider' (Simulation Behavior Provider), 'Worker\*' (Simulation Behavior), and 'Status' (Pending). The 'Activity Services' section shows 'Service \*' (0000-WVR), 'Units \*' (1.00), 'Rate' (\$0.00), and 'Secondary Code' (0000-WVR).

**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 [v]

Activity Services

Service\*: [ ] [Clear] Total Cost: [ ]

Units\*: 4

Rate: [ ]

Secondary Code: [ ]

Unit Type: [ ]

Documentation

Provider Documentation Type \*

- Annual Report
- Daily Attendance Log
- Monthly R&M
- Monthly Summary
- Progress Note
- Quarterly Summary
- Toolbox
- Service Log

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.

The screenshot shows the iConnect system interface. On the left sidebar, the 'Notes' tab is selected (2). At the top, the 'MY DASHBOARD' tab is active (1). A modal window is open, displaying a message from hssfapdstage.wellsky.com (5) with an 'OK' button (4). The modal also contains a 'Mark as Read' button (6). Below the modal, a table displays 4 records (3) with columns for iConnect ID, Consumer, Note Type, Note Sub Type, Note Date, Subject, Author, and Status. The table data is as follows:

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
215832	Bud, Grandpa	APD Waiver Eligibility Verification	LOC Met/ Medicaid Eligible	08/15/2024		DDMC Worker4	Complete
215834	Fritz, Uncle	Support Plan	Documentation	08/15/2024	Disaster Plan	DDMC Worker6	Complete
215834	Fritz, Uncle	Confidential Documentation		08/15/2024	DDMC iConnect Scavenger Hunt -	DDMC Worker6	Complete
215831	Robinson, Franny	Support Plan	Documentation	08/15/2024	Disaster Plan	DDMC Worker3	Complete

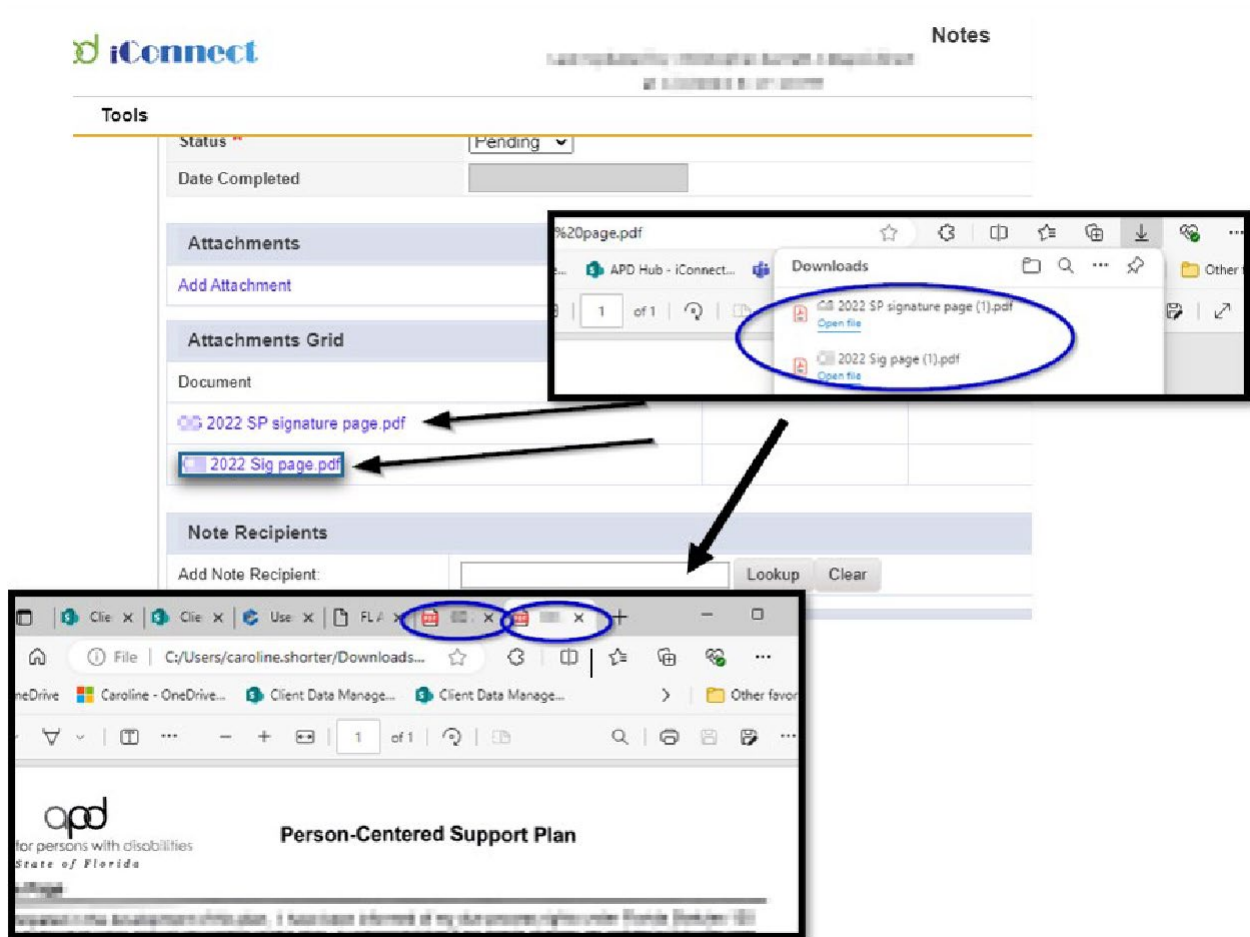
December 1, 2024

### 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?

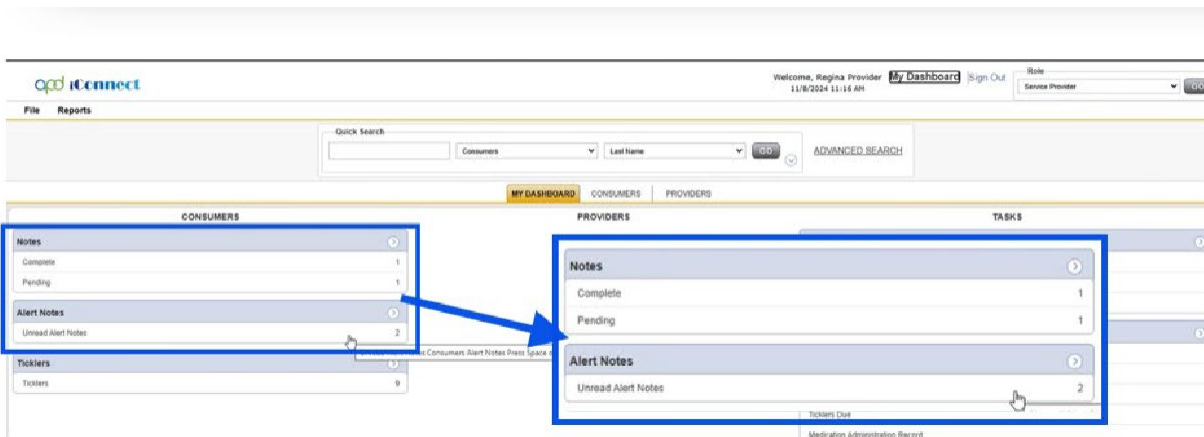
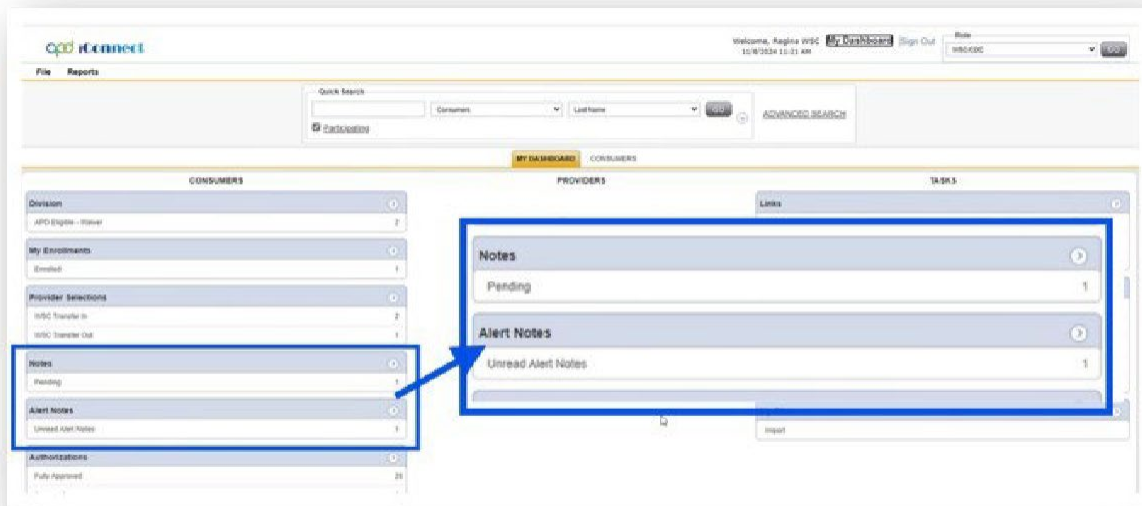
No, when the user clicks on one attachment, the file will download onto their device, so the user can open multiple files at one time by downloading all the files and opening them from the device. This allows for multiple documents to remain open at the same

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.

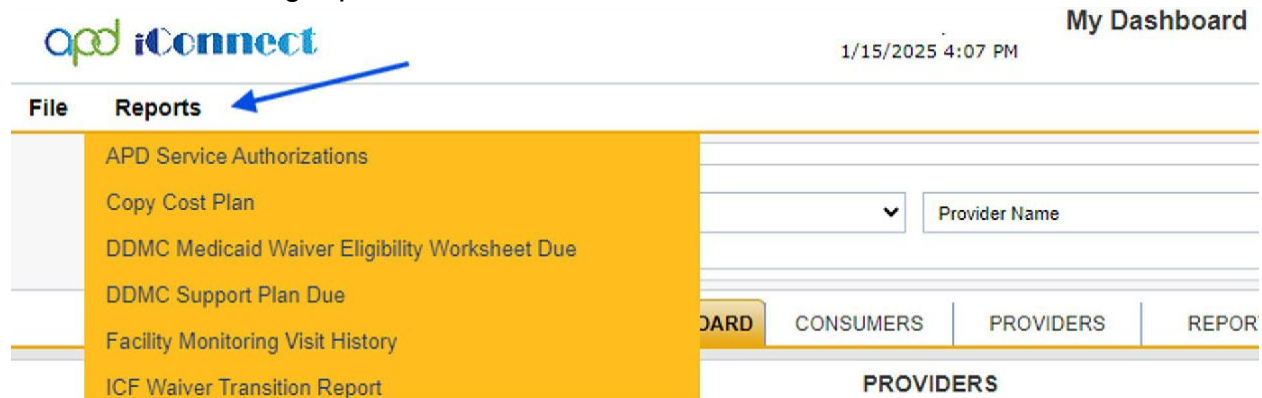


**February 1, 2025**

## Where do I find reports in iConnect?

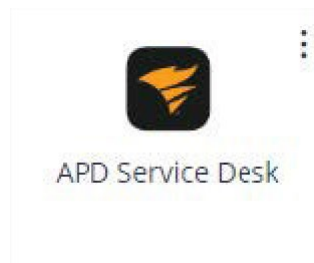
Reports are found in different screens within iConnect depending on their usage and workflow. Locate the Reports menu dropdown on the screen to see what reports are available for you to use. Remember to refer to the job aids available for detailed

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.



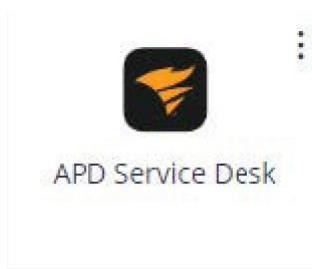
2. Click the “New Ticket” button located on the upper right side of the screen to open the new ticket window and fill out the required fields in order to open a new helpdesk ticket.



### 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.

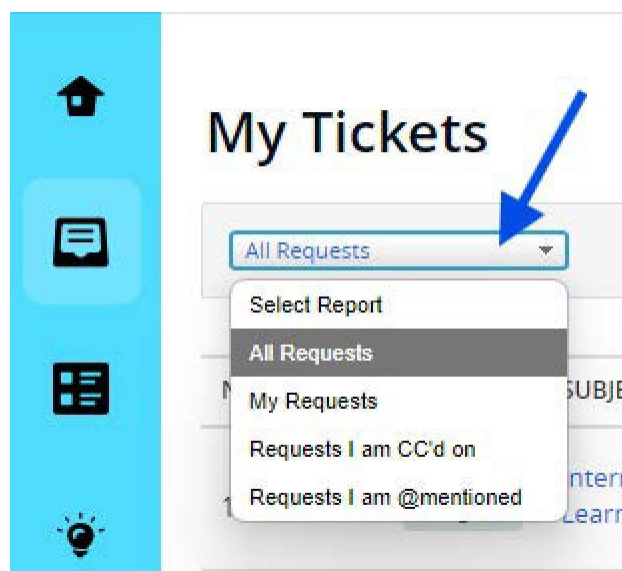




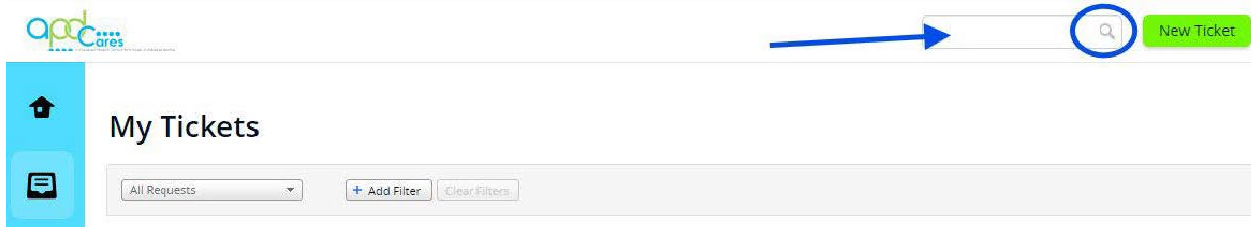
2. Click the ticket icon on the left side of the screen.
  - a. If you hover over the ticket icon it will display "My Tickets."



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.



- 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:

File Reports Ticklers View Consumer Incident

Diagnosis Eligibility Medications **Auths** Provider Documentation Contacts Consumer Module User

Demographics Divisions Consumer Budgets Programs Provider Selections SAN Notes Forms Appointments Plans Re-enrollment Payers

Filters  
Division: [v] [ + ]  
[ Search ] [ Reset ]

13 Auths record(s) returned - now viewing 1 through 13

Division	Provider	Auth ID	Start Date	Cancelled
APD	Pending Provider	232432	06/05/2019	No
APD		232433	06/05/2019	No
APD	A Test Provider	232434	05/01/2019	Approved

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	92507.UC	(4200) Speech Therapy	05/13/2019	15 mins	06/30/2019	Ready to Send	14	Approved	\$16.02	\$2,242.80	No	Agency	Hernando	
140093	55130.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

**Auth Service EDI Status**  
Ready to Send  
Ready to Send

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 overlapping screenshots from the iConnect system, illustrating the workflow of an authorization record. The top screenshot shows a list view grid of 13 authorization records. The bottom two screenshots show the details of a specific authorization record, first in the 'Authorization' tab and then in the 'AuthService' tab. Arrows and yellow boxes highlight the 'Approved' status across all three views.

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

**AuthService Details:**

Authorized Service	PA Number	5119110010
Start Date	05/01/2019	
End Date	06/30/2019	
Service Code	T2903 UC	
Secondary Code	T2903 UC	
Service Description	(K20) Transportation - Trip	
Unit Type	Trip	
Units Per	80.00	
Units of Measure	Month - Round Up	
Max. Units	480	
Rate	\$20.00	
Amount Approved	\$5,600.00	
Auth Service EDI Status	Approved	
Status	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  
 apr Consumers Last Name GO 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. The 'File' menu is open, and the 'Print' option is selected. A print dialog box is displayed, showing the following settings:

- Print: Total: 1 sheet of paper
- Printer: [Selected Printer]
- Copies: 1
- Layout: Portrait (selected), Landscape
- Pages: All (selected)

The print preview shows the '10 Consumers' list view grid, which is the same table shown in the first image. The grid contains 10 rows of consumer data, including iConnect ID, Last Name, First Name, Status, and Region. The 'Print' button is visible at the bottom of the dialog box.

May 1, 2025

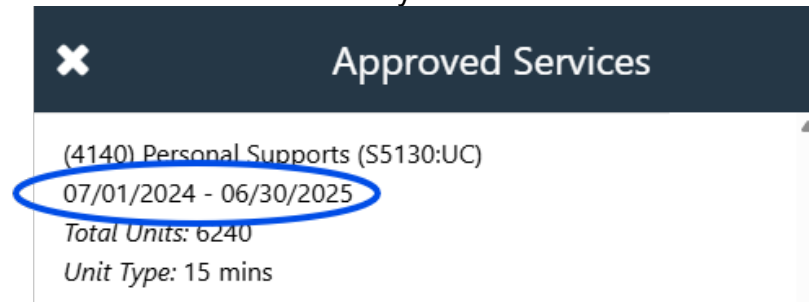
## Verifying the dates of a service authorization

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 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:



Diagnosis Medications Provider Documentation Contacts  
Demographics Divisions **Notes** Forms Appointments

Filters  
Note Date ▾ +  
Search Reset

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

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

First Previous Records per page 15 Next Last

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.

Diagnosis Medications Provider Documentation Contacts  
Demographics Divisions Notes **Forms** Appointments

Filters  
Form ▾ +  
Search Reset

2 Consumers Forms record(s) returned - now viewing 1 through 2

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

First Previous Records per page 15 Next Last

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

Medicaid ID can also be located on the **Provider ID Numbers** tab of the Providers record. This is the data element that the interface matches on and is restricted to APD staff to update.

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

Filters  
Identifier +  
Search Reset

2 Providers Provider ID Numbers record(s) returned - now viewing 1 through 2

Division	Identifier	Type	Category	Start Date	End Date	Active
APD	5678919452	Medicaid ID		01/01/2019		Yes
APD	19452_Provi	SenderID		01/01/2019		Yes