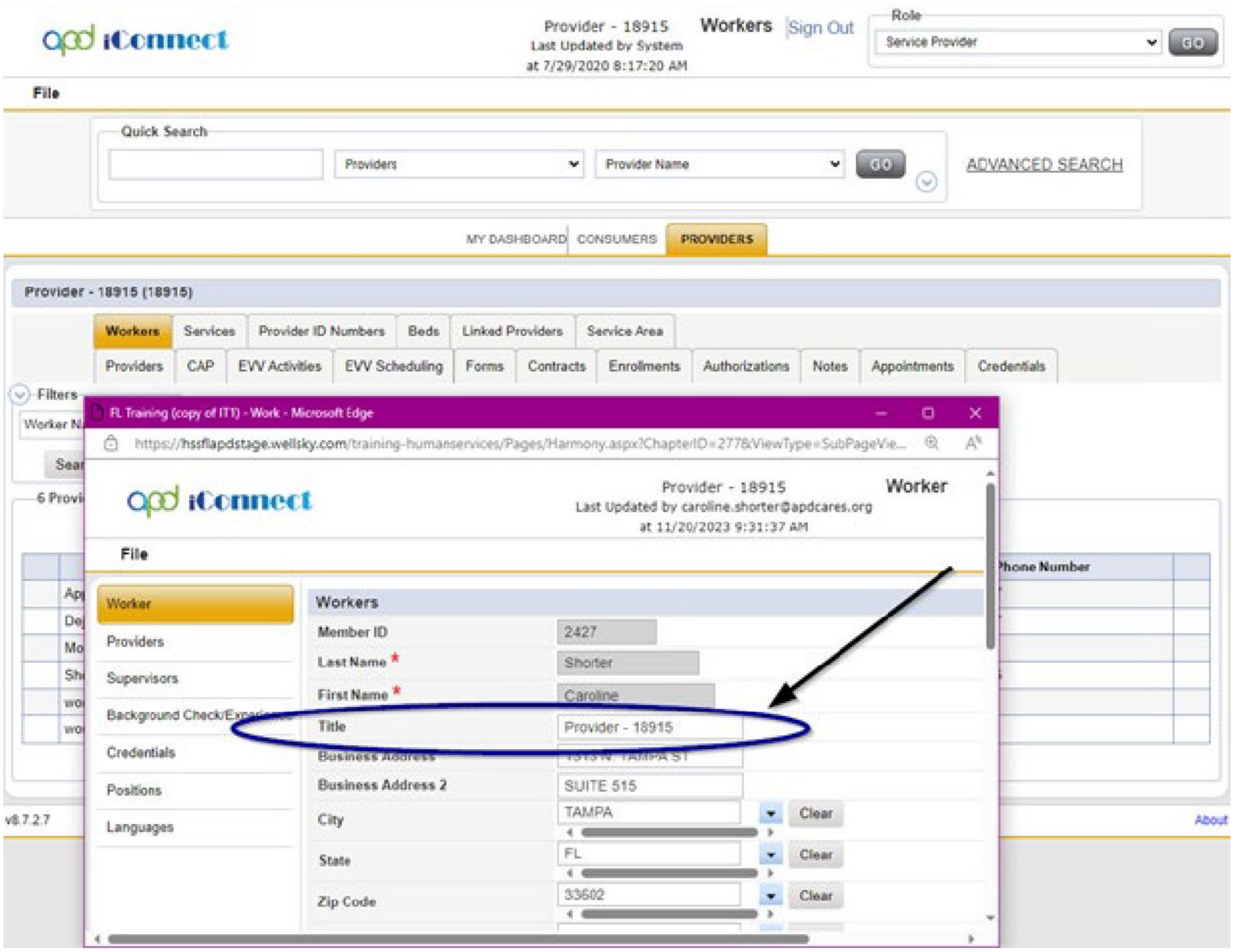
May 1, 2024

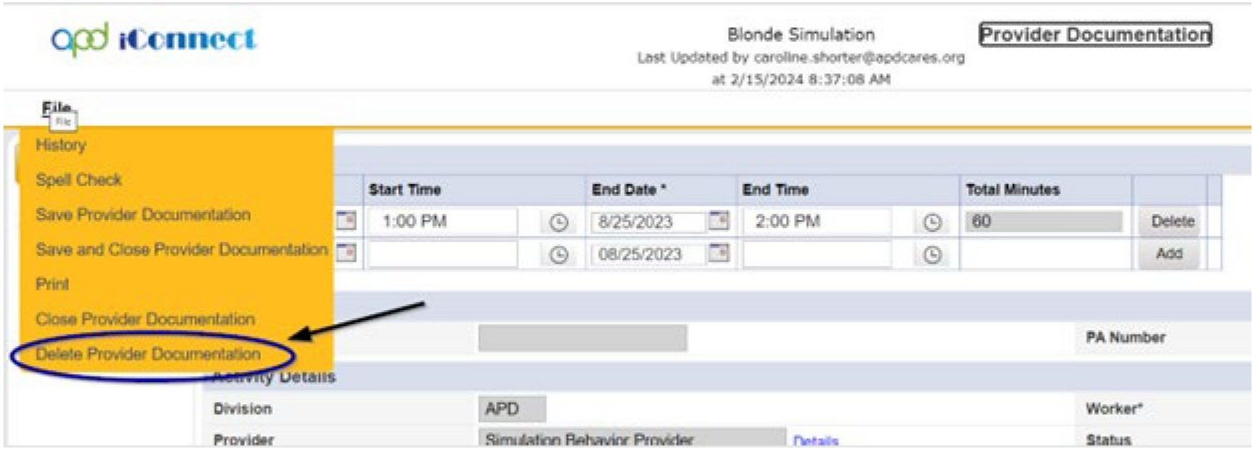
Identifying Multiple Workers with the Same Name

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.

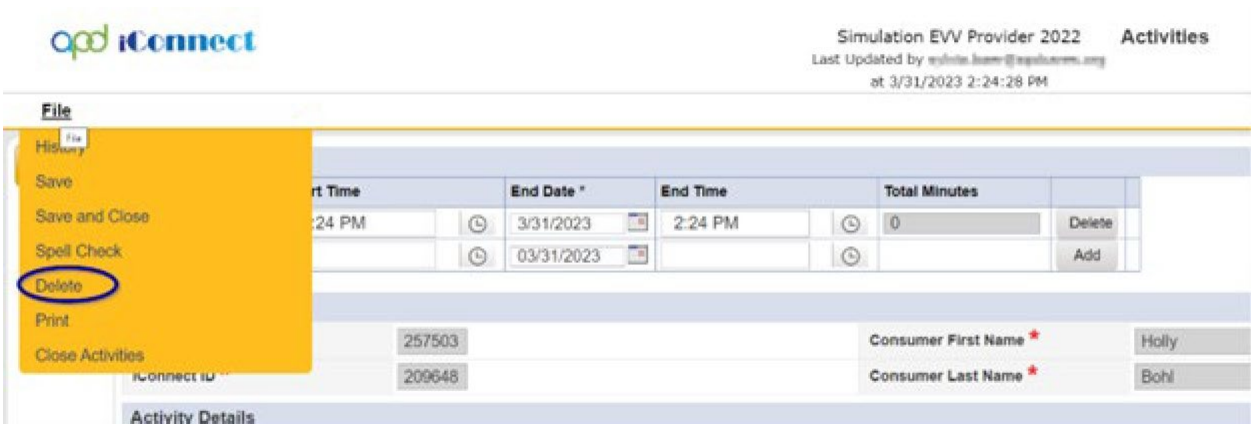


Missing EVV Activities/Provider Documentation Activities

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.

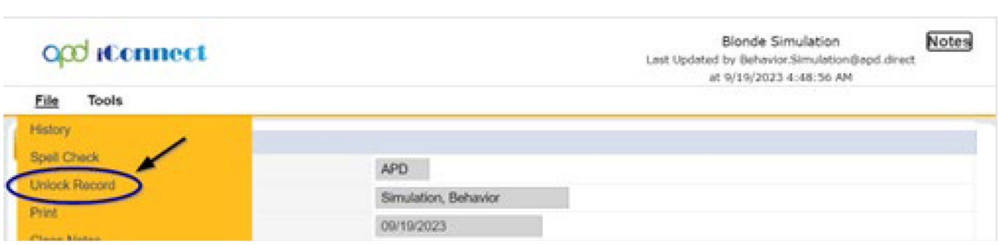


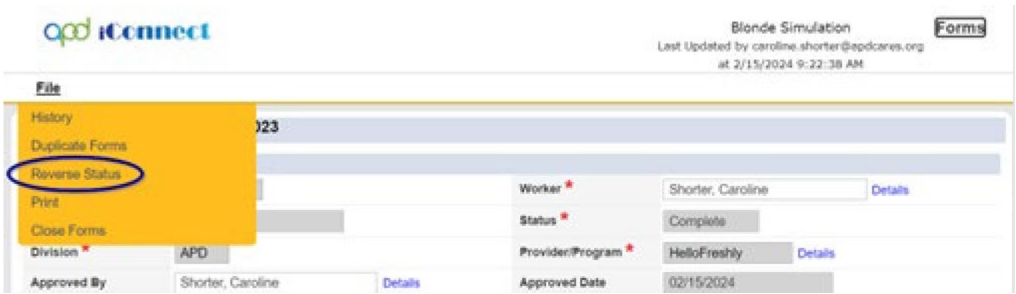
Have you identified missing EVV Activities? The Provider EVV Manager Role has the necessary permissions to delete existing EVV records. As an agency owner, if you feel that these permissions are unnecessary for your staff, manage their user accounts and remove the Provider EVV Manager role from their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

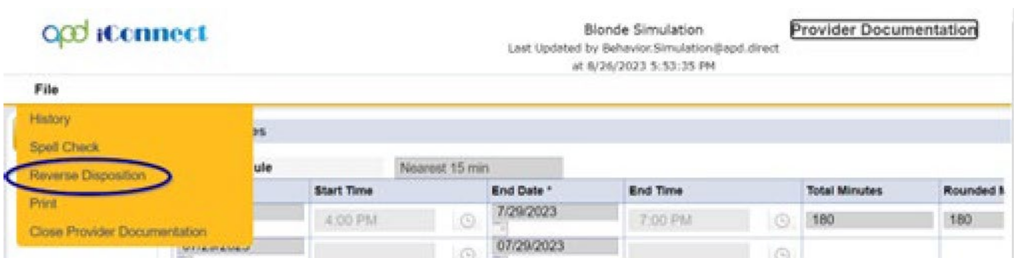


Need to Update a Record in Complete Status?

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.

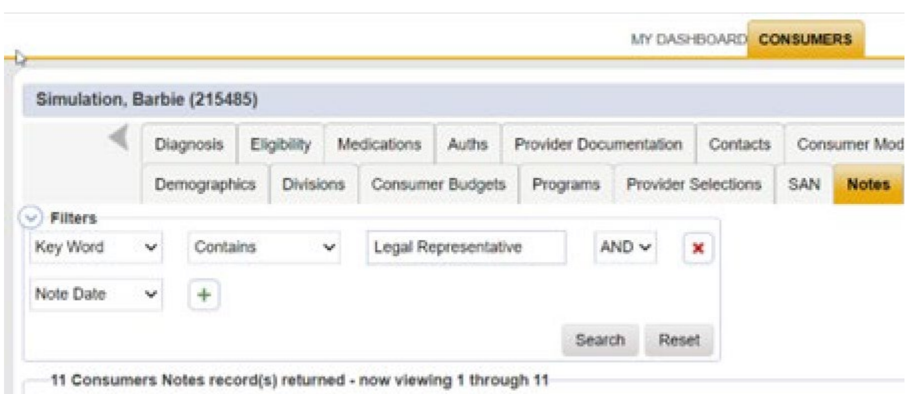


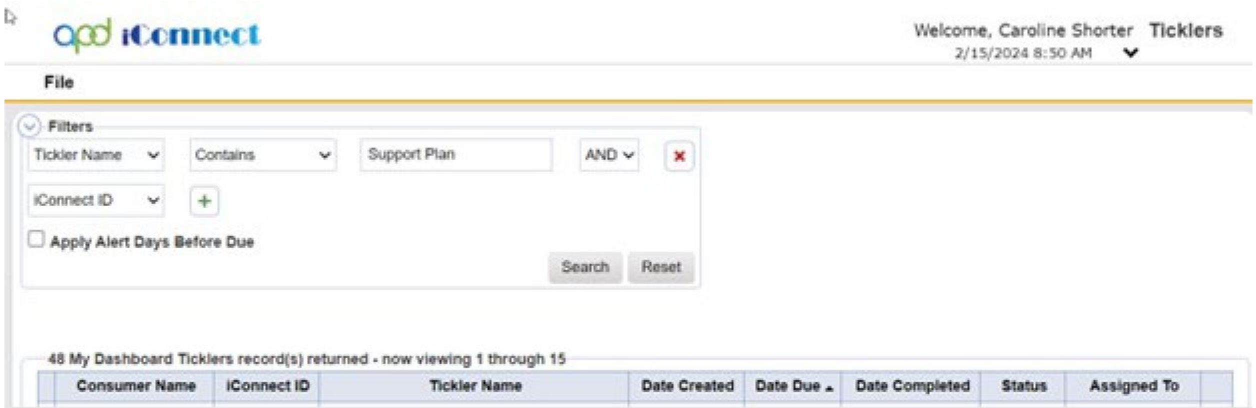




Using Filters

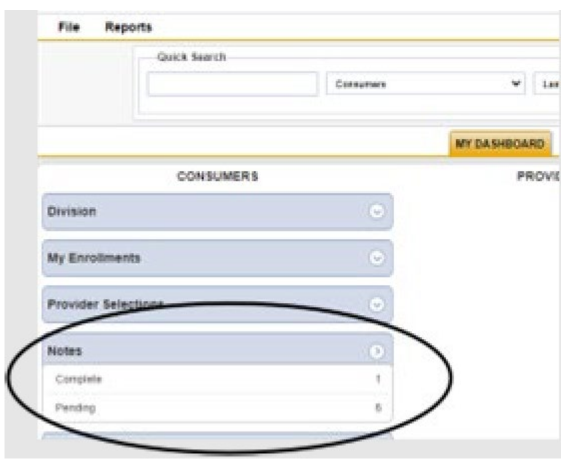
Have you been using iConnect for some time and are having challenges in locating specific records? Use the Filter Options available within most tabs/pages in iConnect. If performing a word search, update the criteria to “Contains” and type the word that is being searched…. Or type the first three letters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

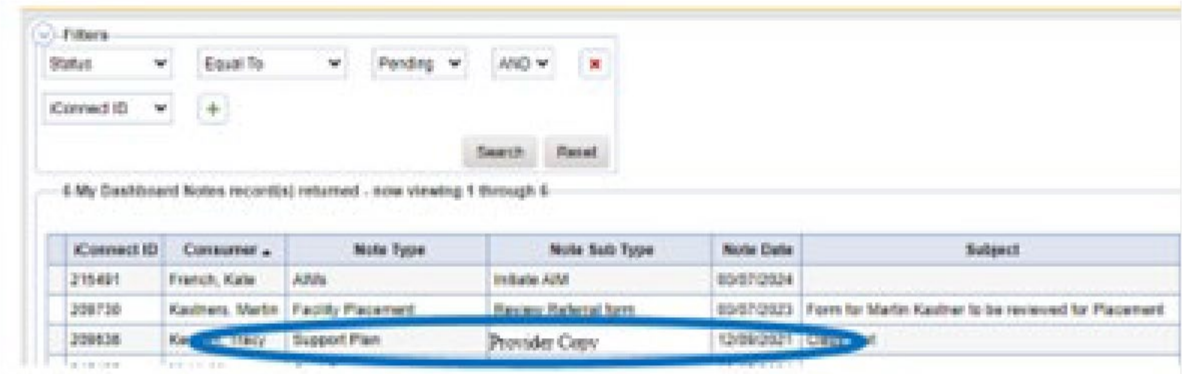


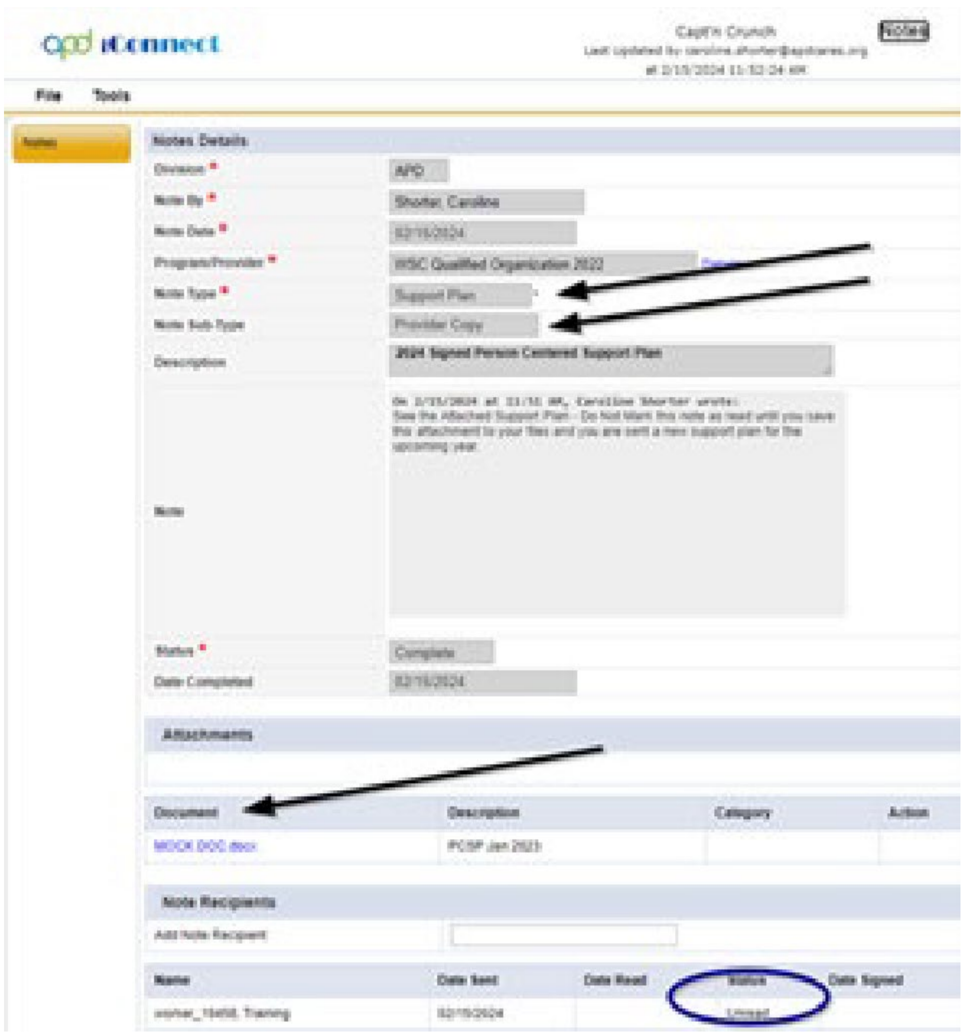


Identifying where the Support Plan is from the Waiver Support Coordinator (WSC)

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.

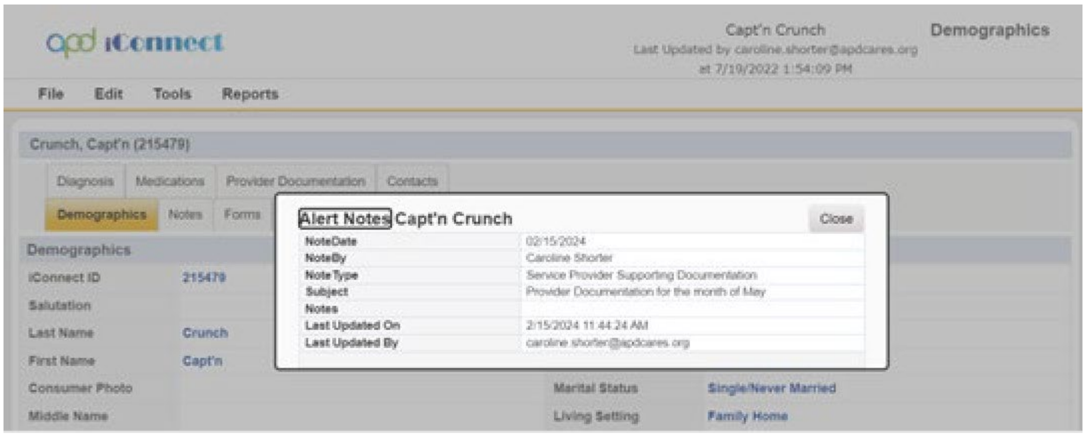


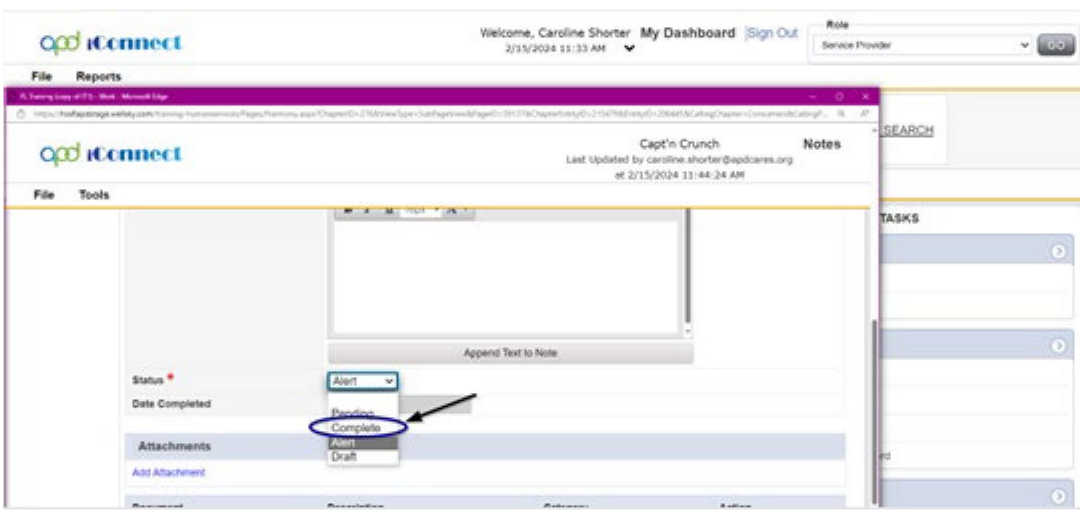




Why Do Alert Notes Appear When a Consumer Record is Opened?

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.

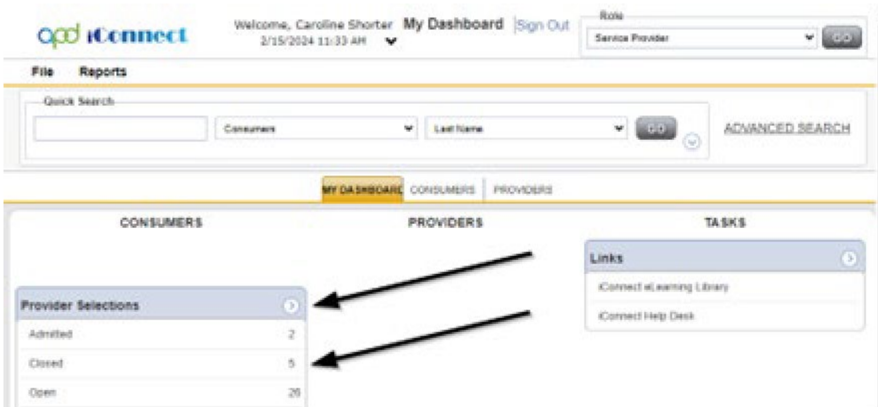


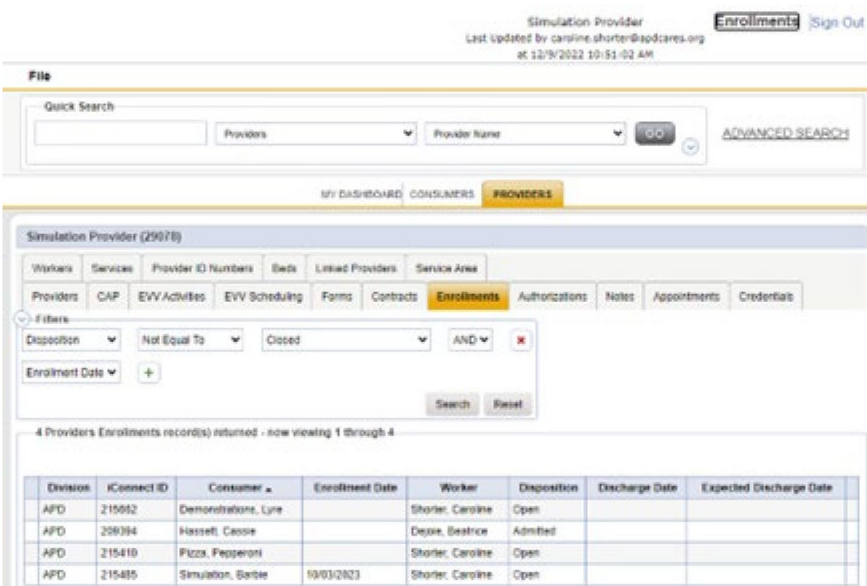


June 1, 2024

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".

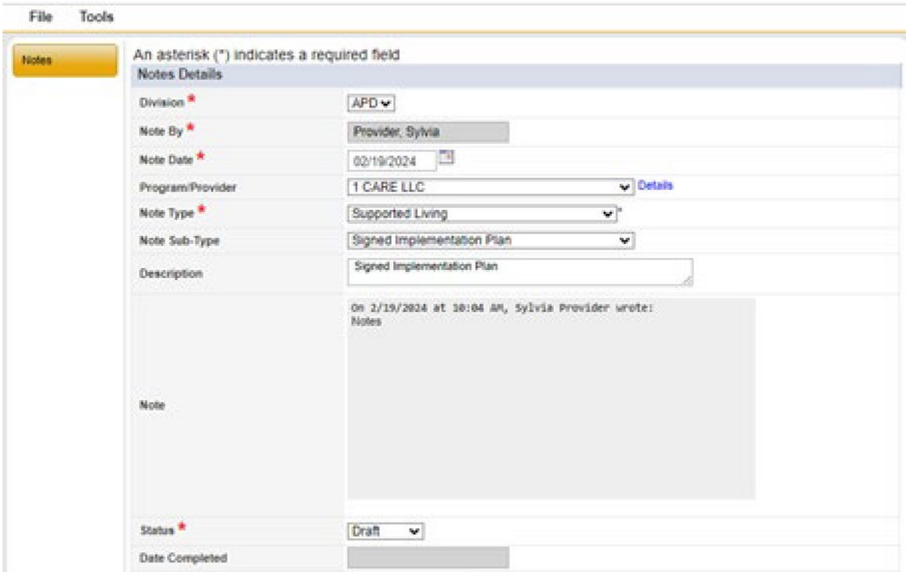


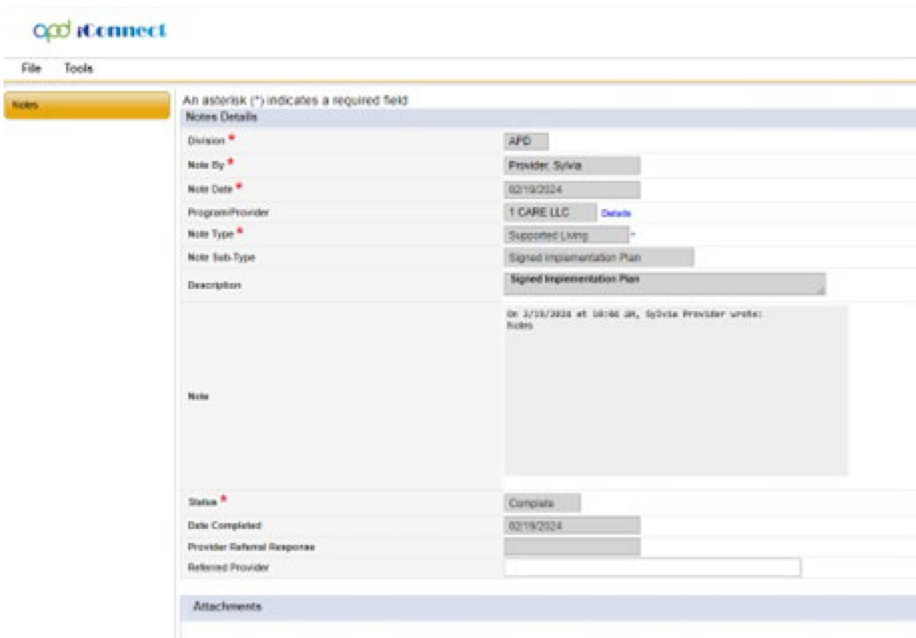


Division	iConnect ID	Consumer	Enrollment Date	Worker	Disposition	Discharge Date	Expected Discharge Date
APD	215662	Demonstrations, Lyre		Shorter, Caroline	Open		
APD	209394	Hassett, Cassie		Depie, Beatrice	Admitted		
APD	215410	Pizza, Pepperoni		Shorter, Caroline	Open		
APD	215485	Simulation, Barbie	10/03/2023	Shorter, Caroline	Open		

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.





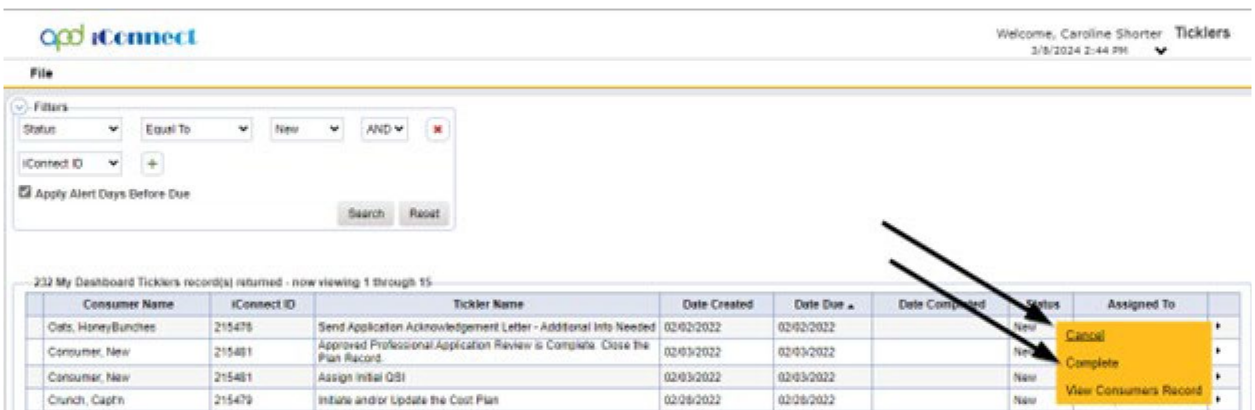
How To Know if Notes Have Been Read

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.**

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.



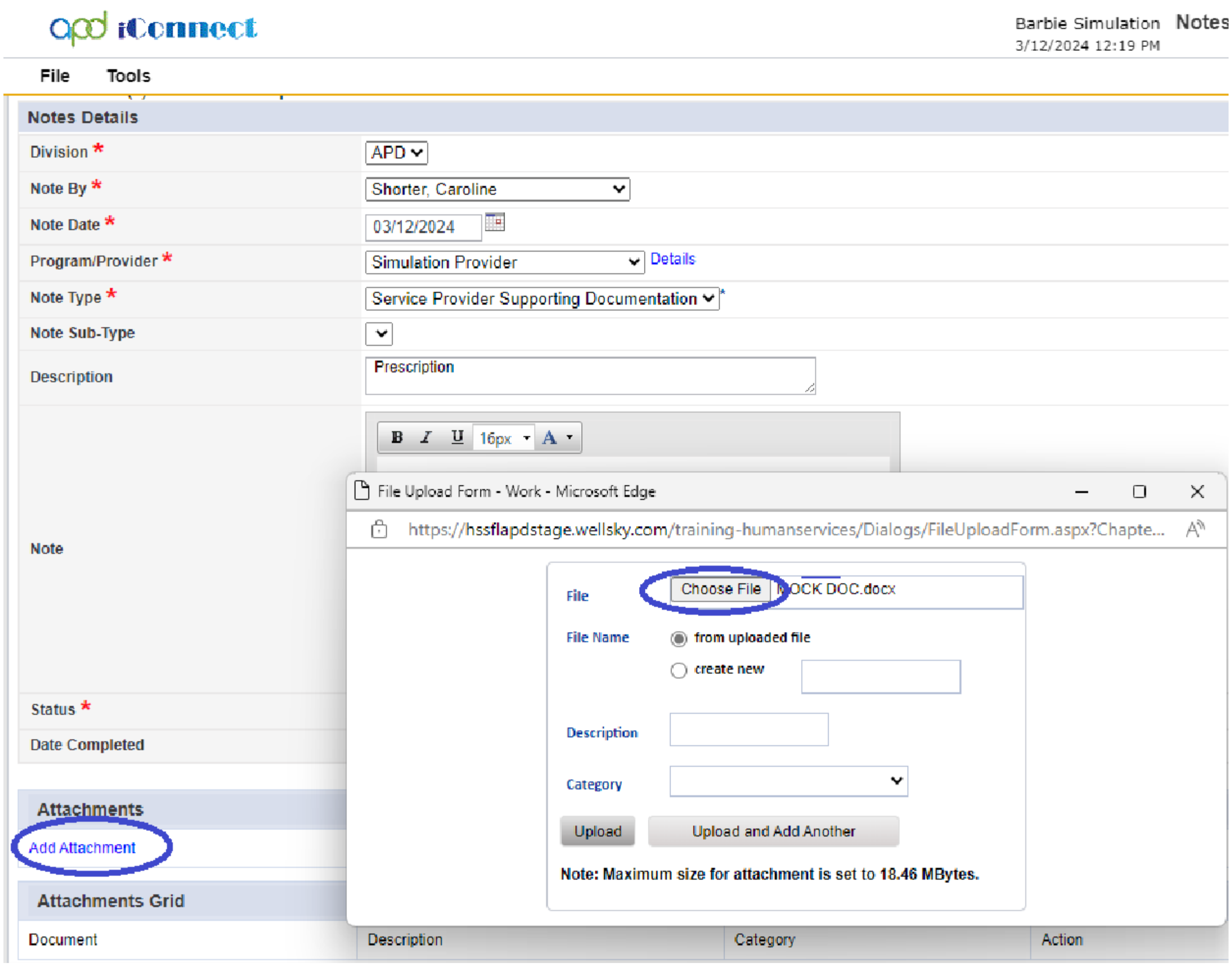
Need A Transcript of TRAIN Course Modules in Writing

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.

July 1, 2024

Attaching Documents From Outside of iConnect

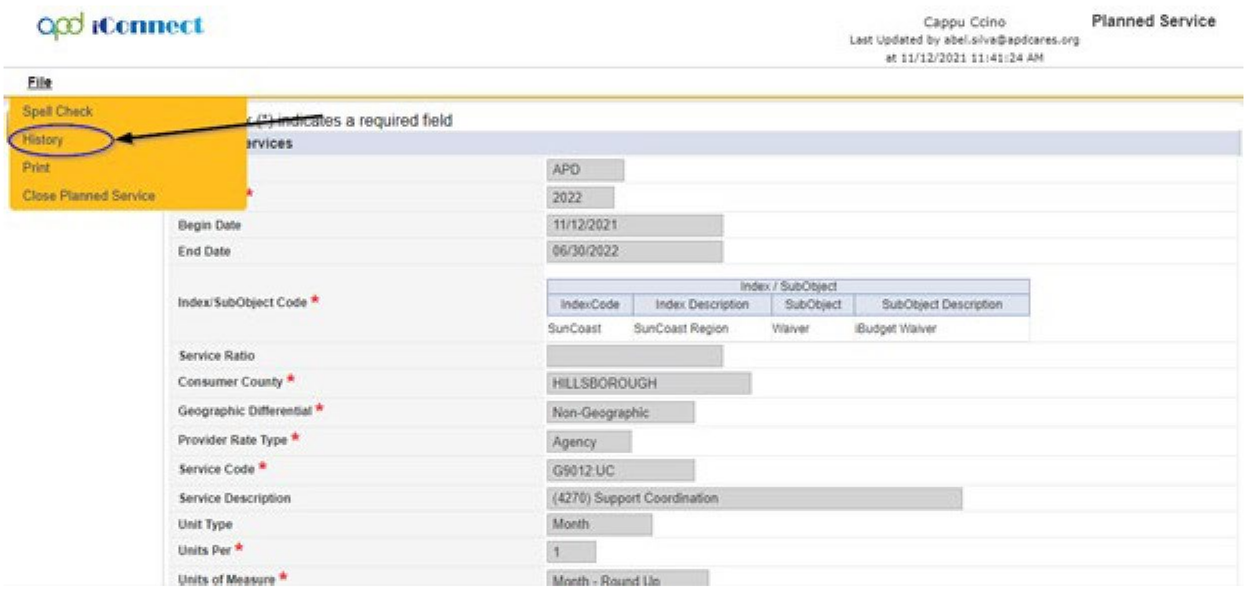
Do you have additional information that you need to include in the Consumer or Provider record? Use the Note tab in either record to add a new note. Complete the required fields in accordance to the workflow you are following. Use the Add Attachment link to open the File Upload Form window. Click “Choose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

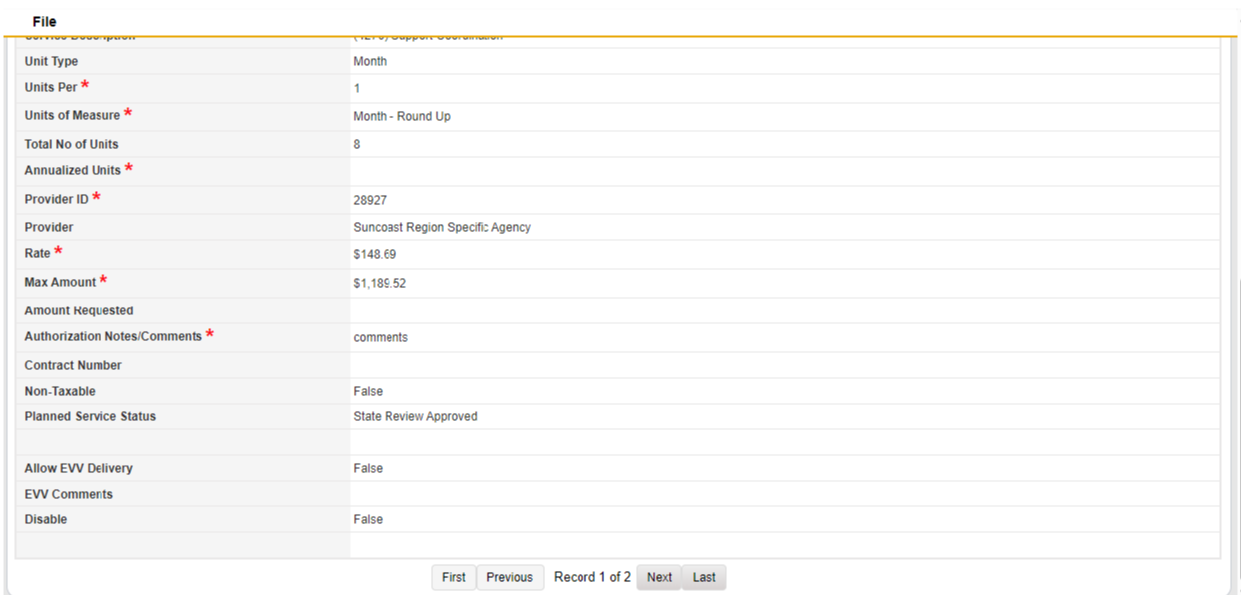


Viewing History in iConnect

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.

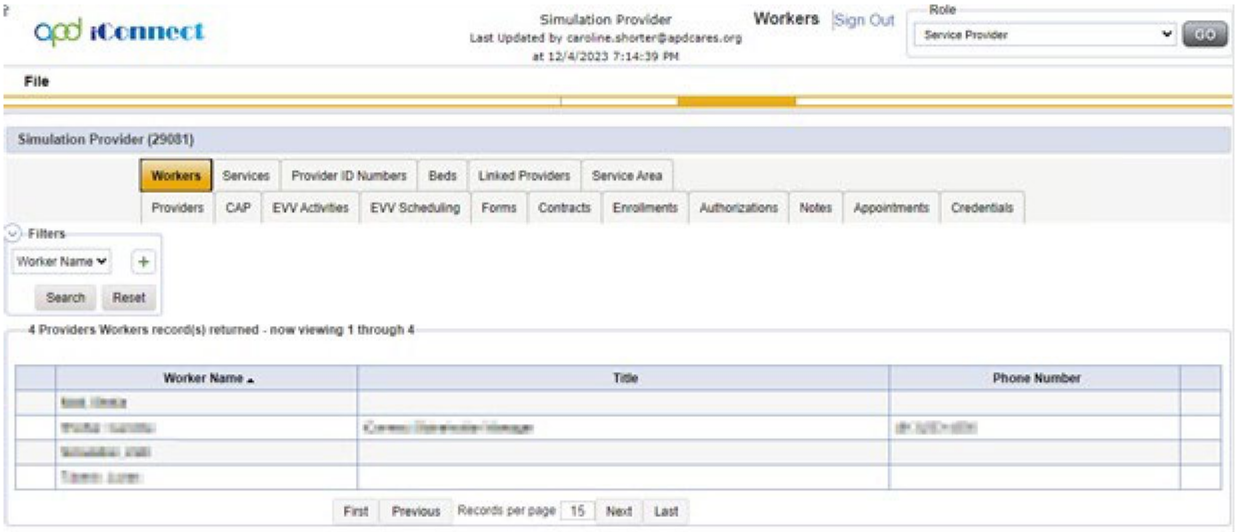


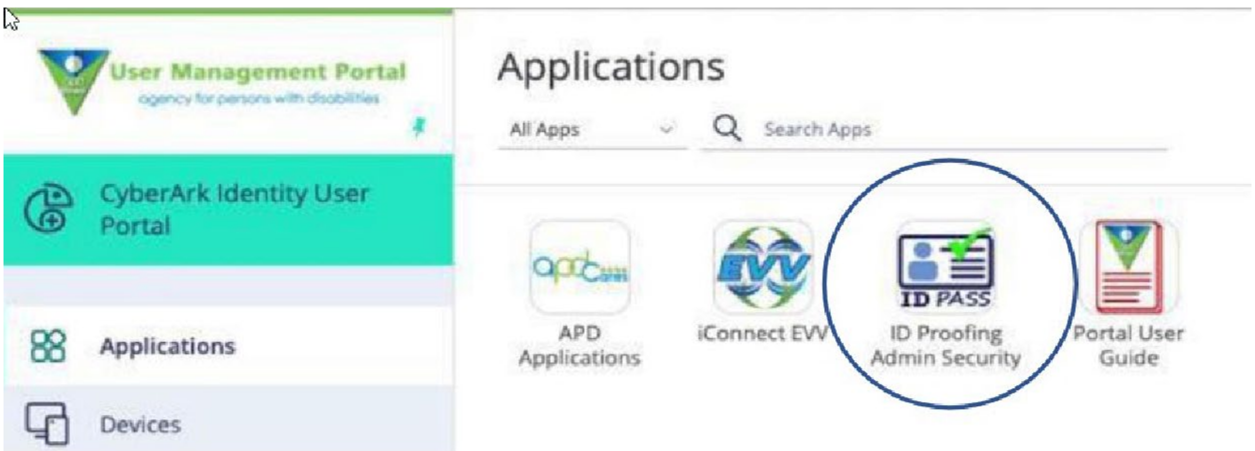


Unable to See Workers in iConnect

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

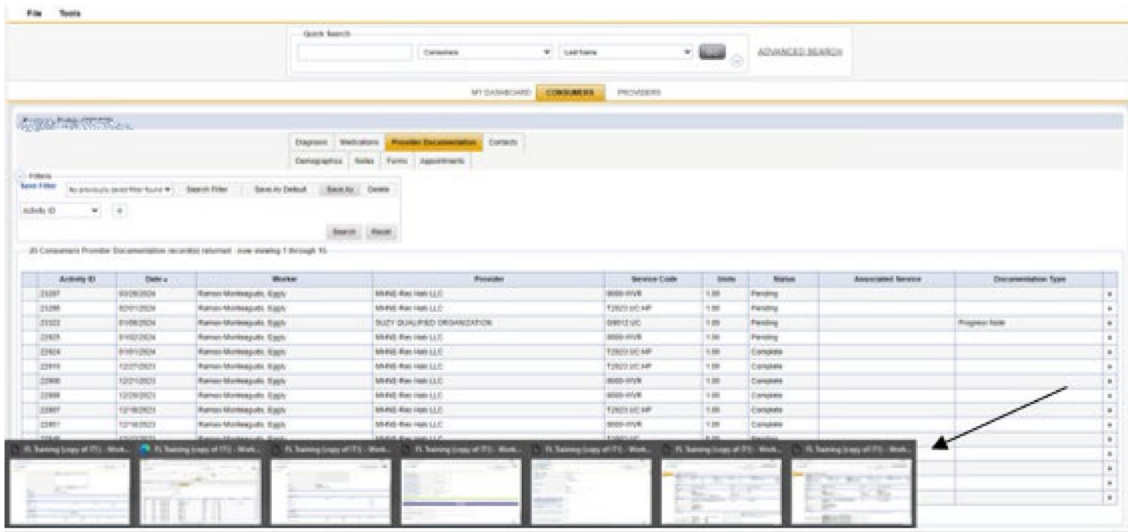
Security to grant this employee access through your organization.

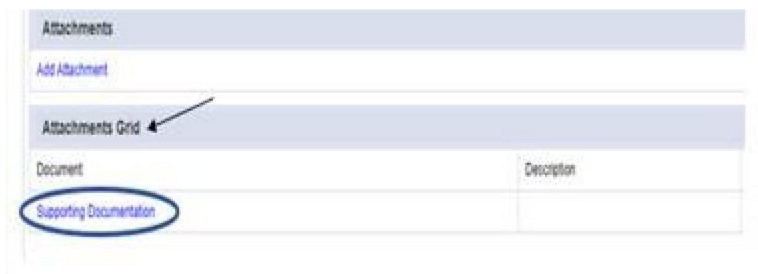


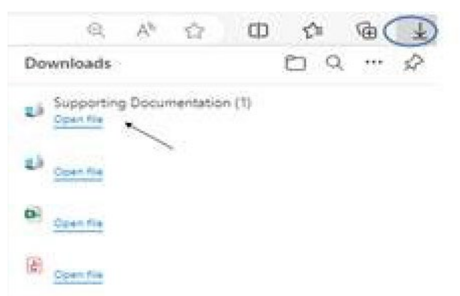


Time-Out Feature in iConnect

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.



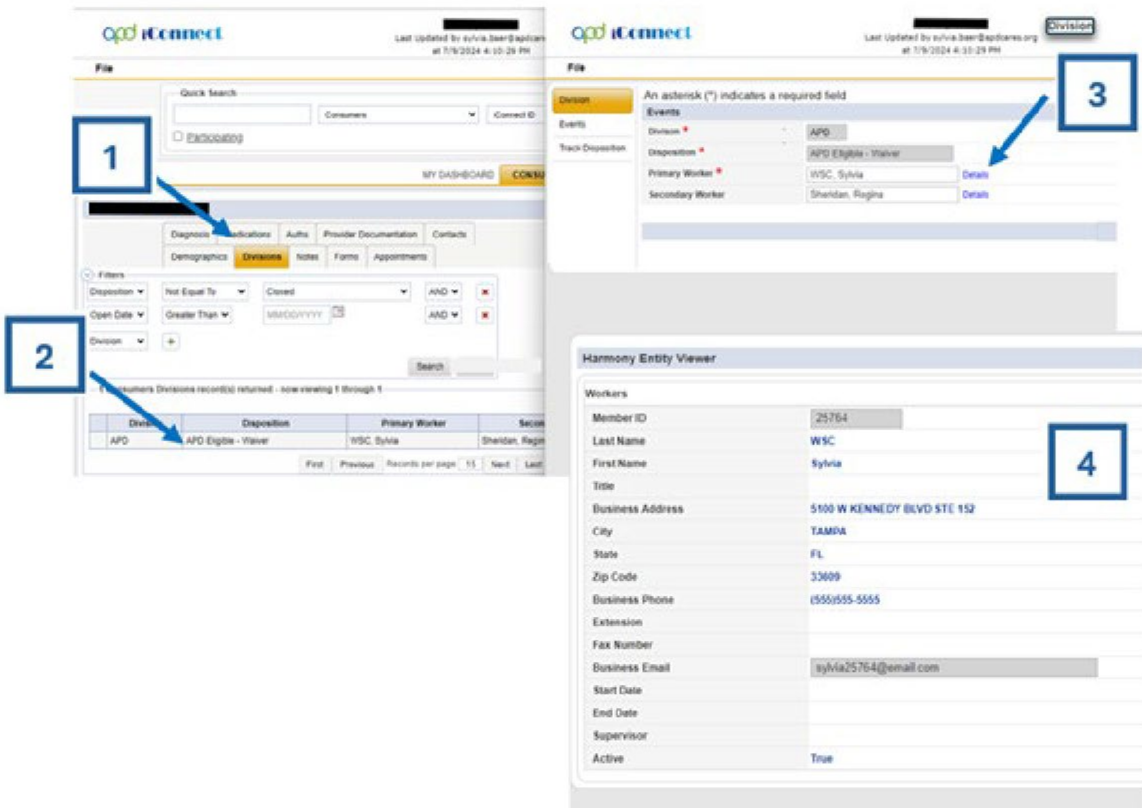




August 1, 2024

Division Tab – Locating WSC's Contact Information for Client

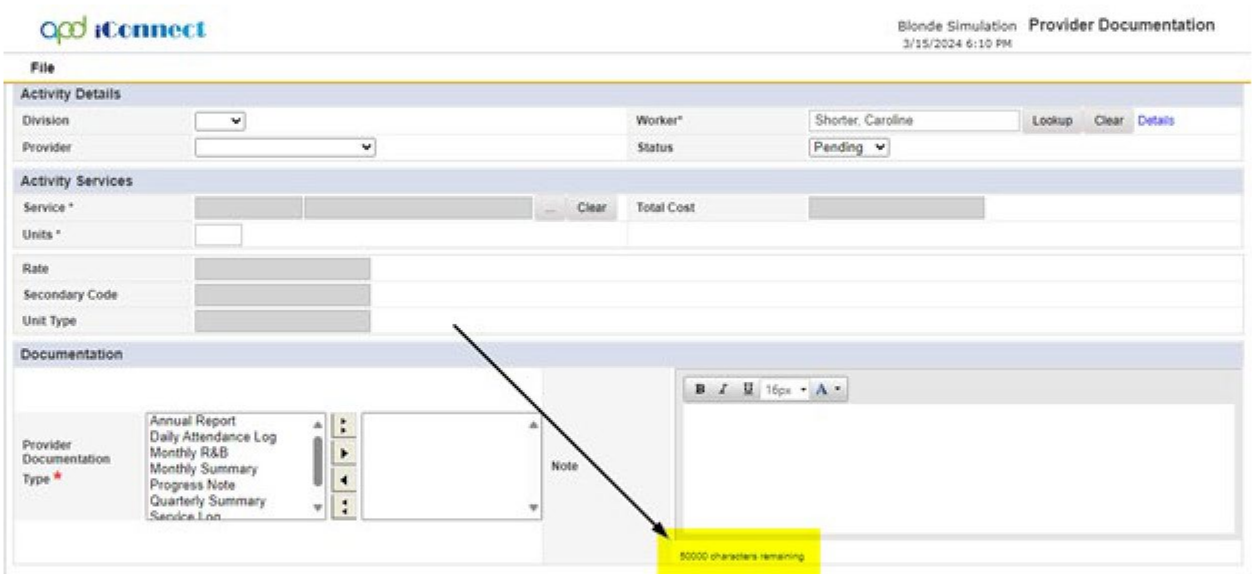
A new enhancement has been implemented in iConnect that now allows the Service Provider and Service Provider Worker roles to access the Division tab of the clients that they have authorizations for in iConnect. This will allow the Service Provider and the Service Provider Worker to find details of the 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

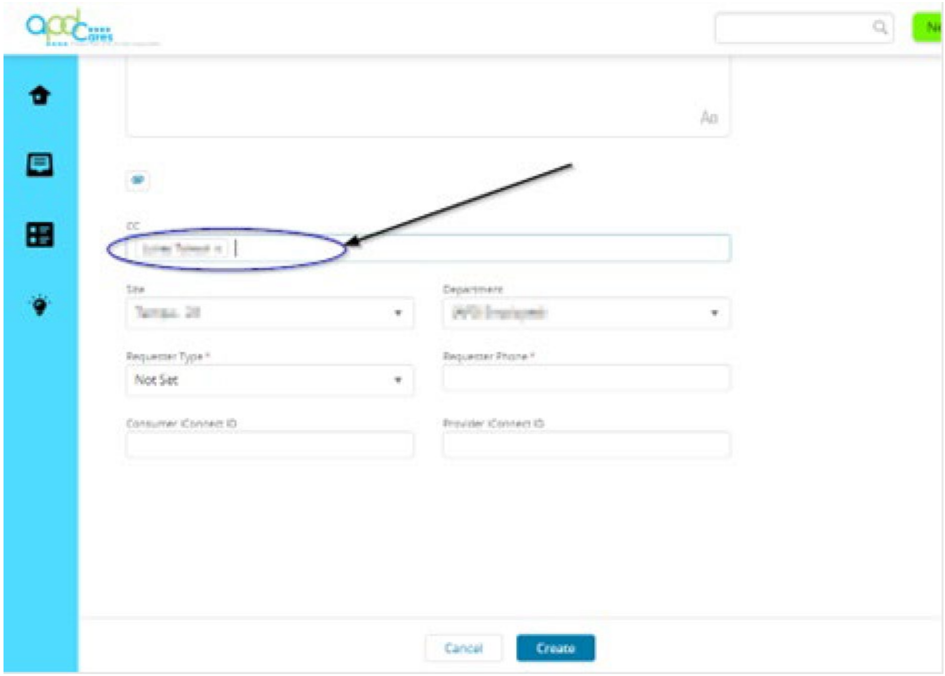
Is there a way to see the character limits within iConnect?

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.



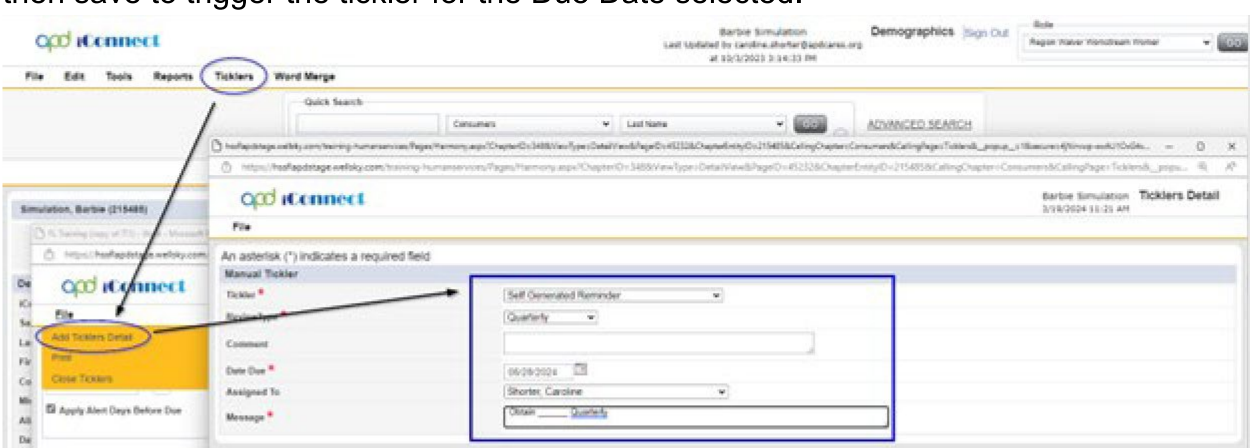
How do I access the Service Desk Ticket that my staff has submitted?

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.



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.

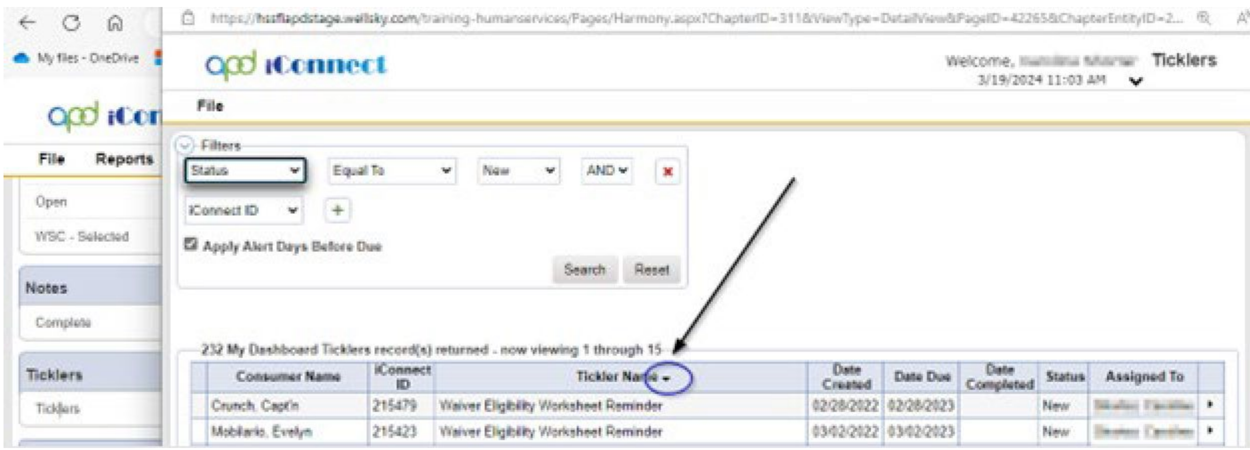


How do I sort through my Ticklers?

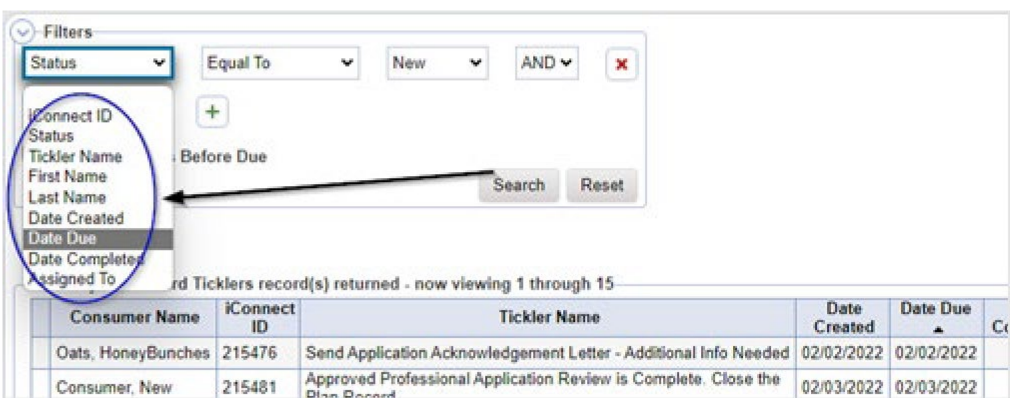
Have you allowed your tickler list view to grow and now are having a challenge in prioritization? Use the sort feature and the filters to locate and prioritize your list of ticklers. You can sort the list by clicking on one of the headings (Consumer Name, iConnect ID, Tickler Name, Date Created, Due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



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

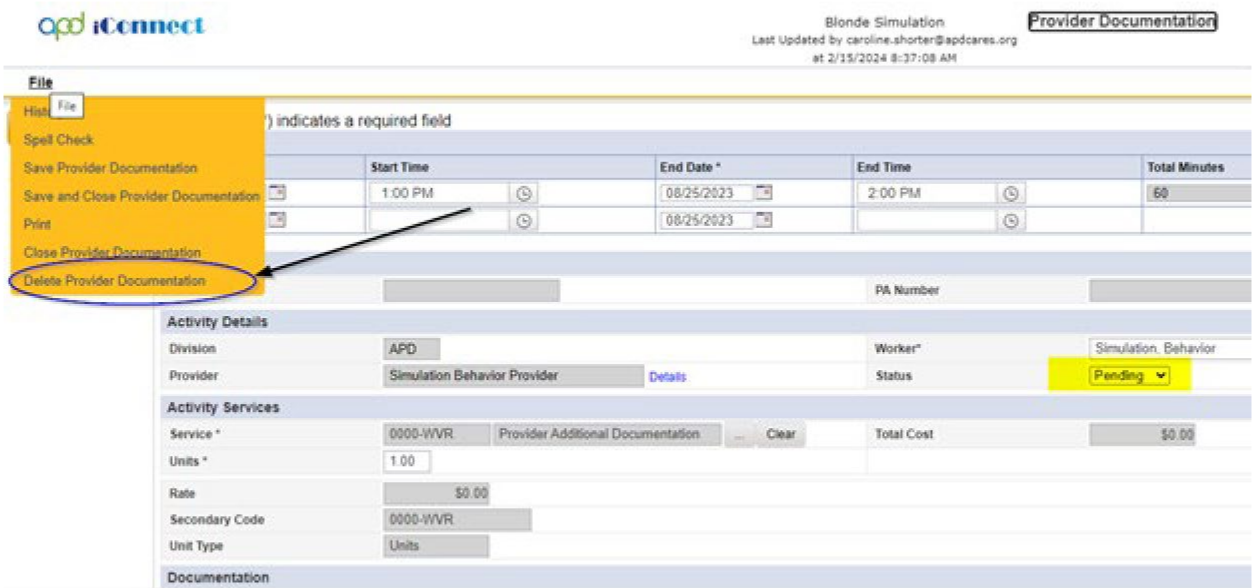


September 1, 2024

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.

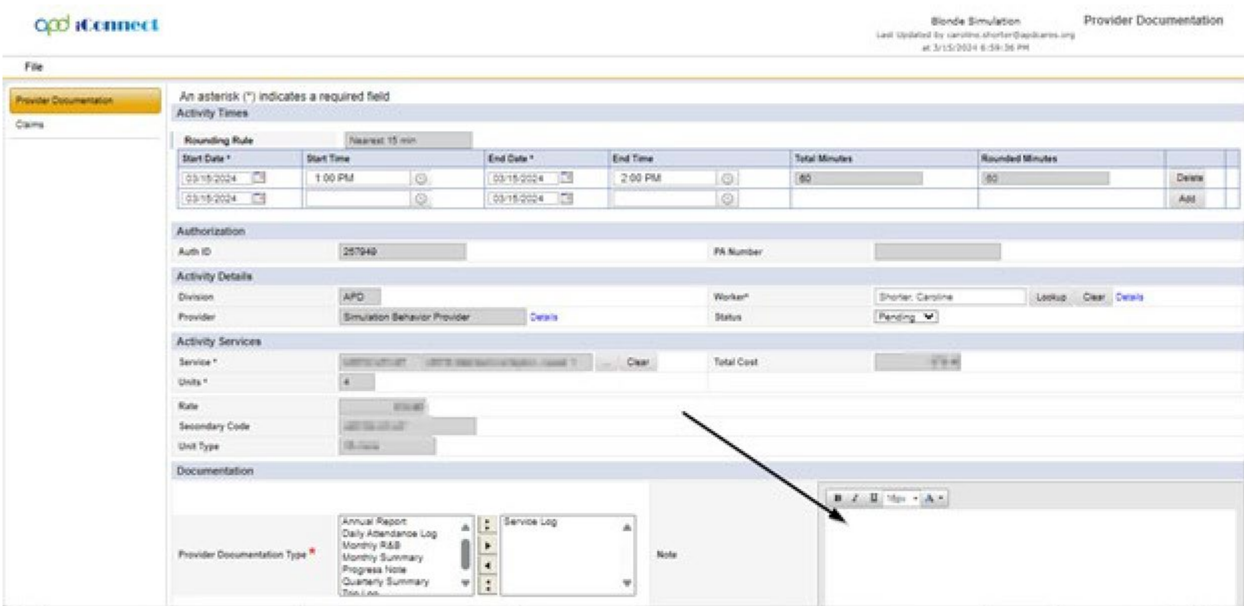


October 1, 2024

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.



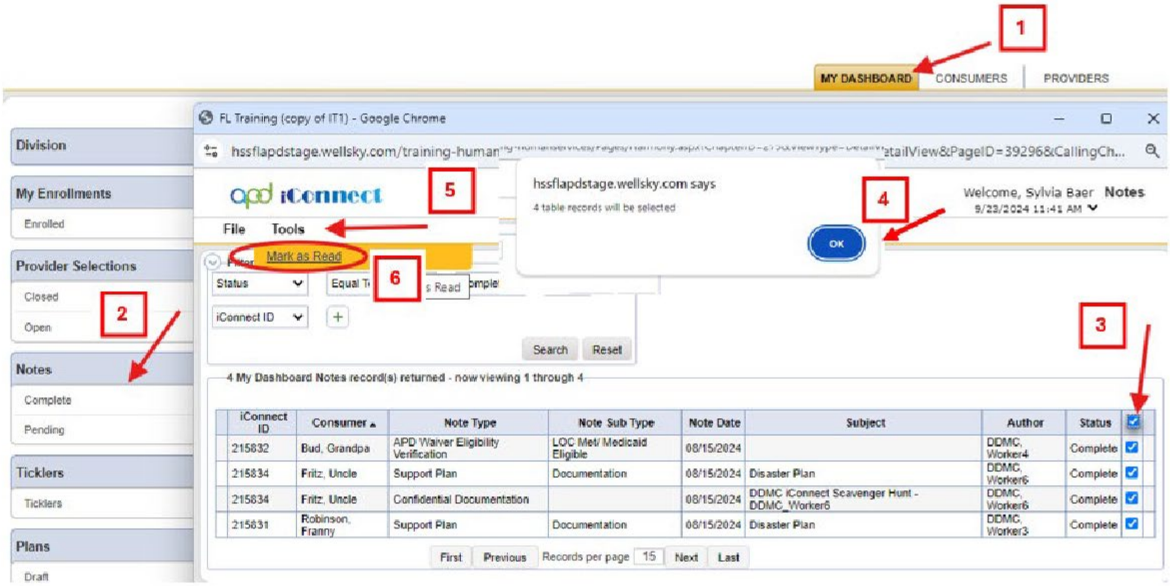
November 1, 2024

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.

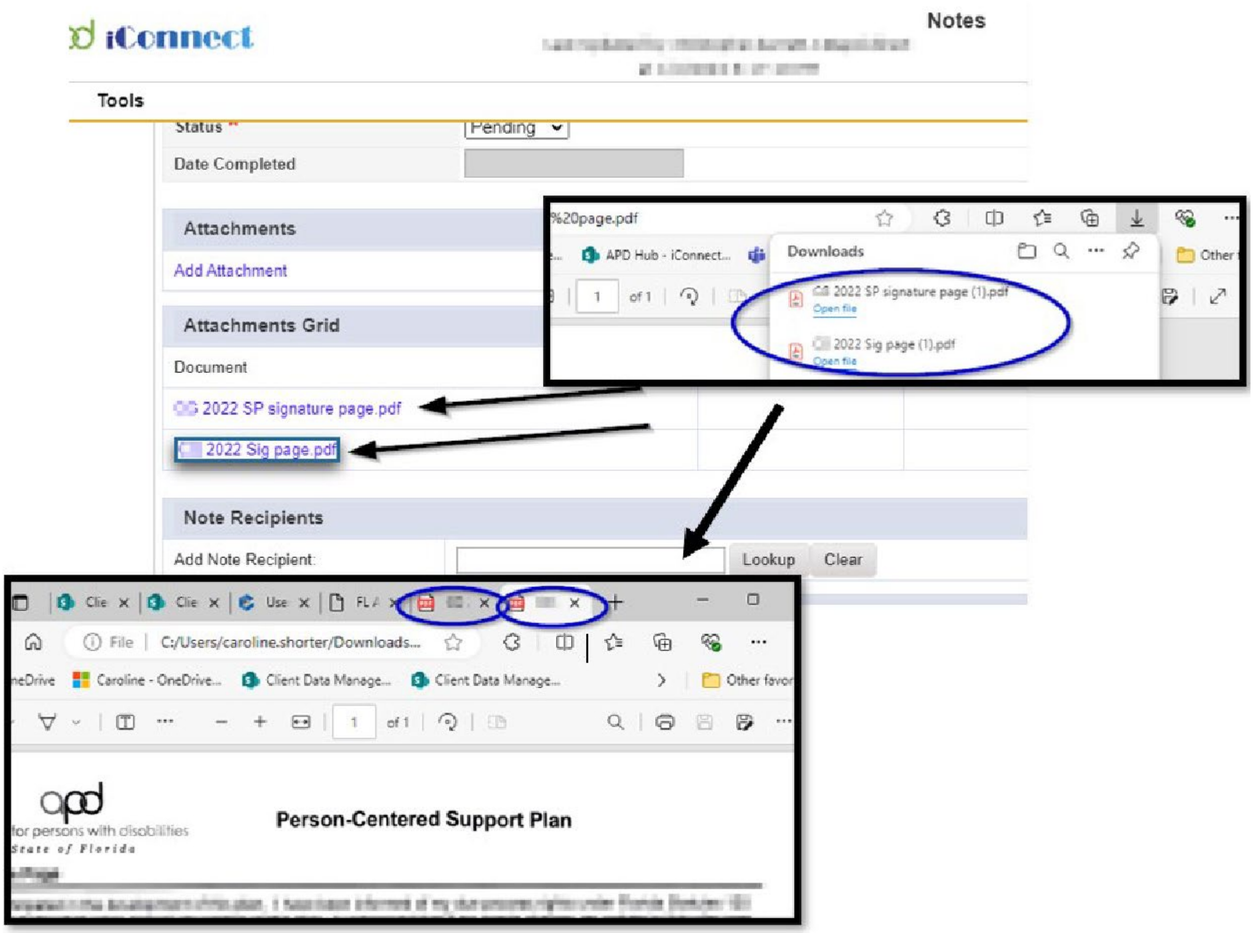


December 1, 2024

Opening Multiple Attachments That Are Within the Notes Tab

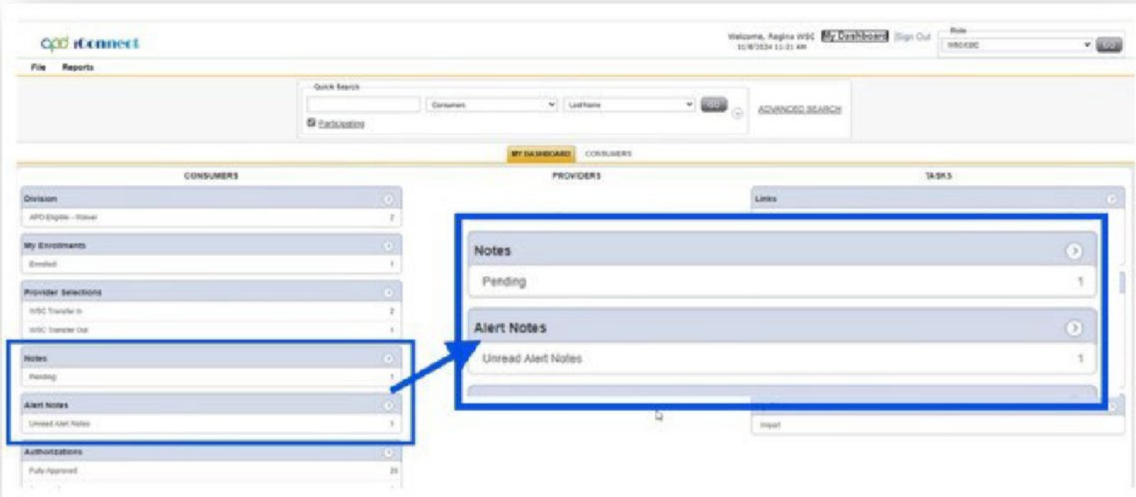
When there is a need to review all the attachments within one Note, are users required to open each attachment then close that attachment to then open another?

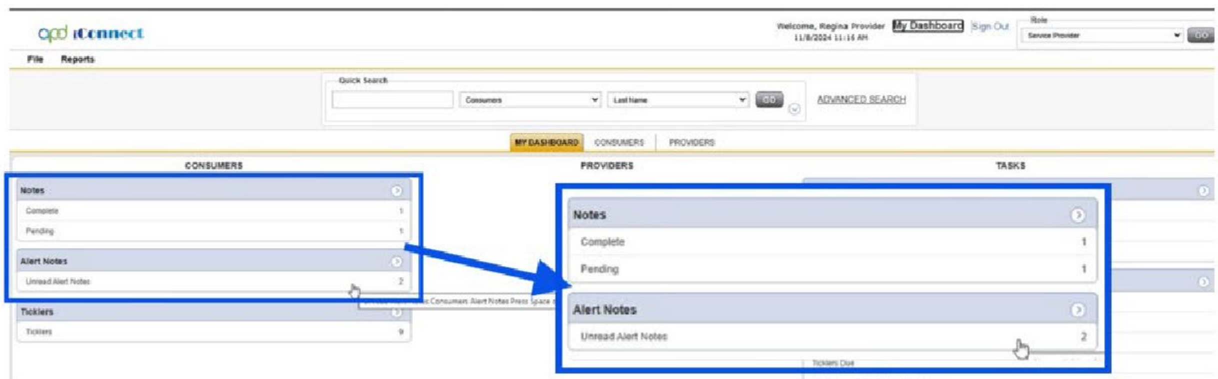
No, when the user clicks on one attachment, the file will download onto their device, so the user can open multiple files at one time by downloading all the files and opening them from the device. This allows for multiple documents to remain open at the same time until the user closes them.



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.

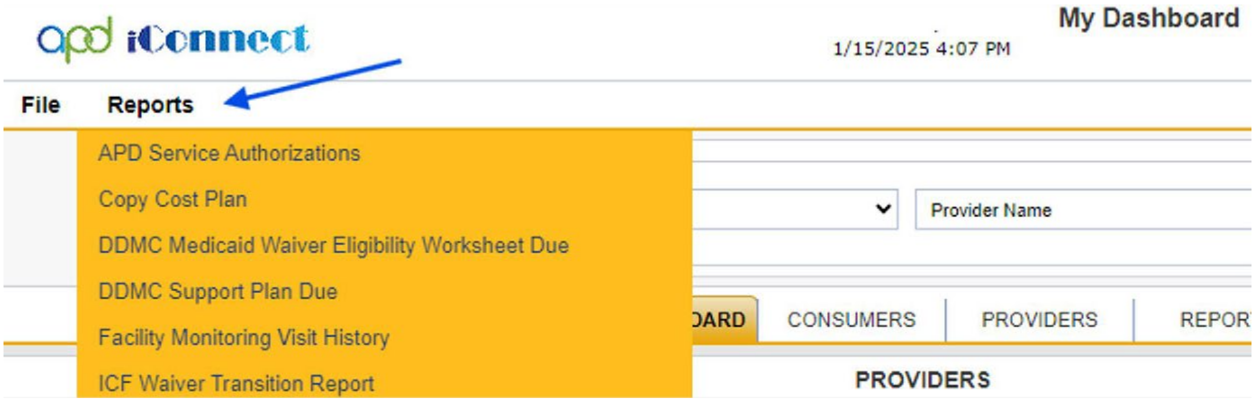




February 1, 2025

Where do I find reports in iConnect?

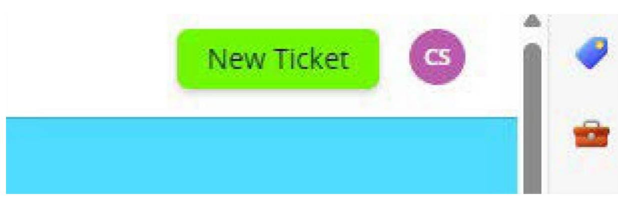
Reports are found in different screens within iConnect depending on their usage and workflow. Locate the Reports menu dropdown on the screen to see what reports are available for you to use. Remember to refer to the job aids available for detailed instructions on using reports.



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.

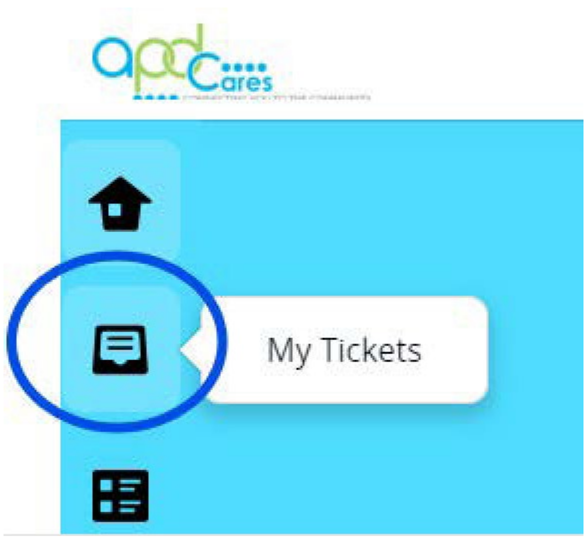
2. Click the "New Ticket" button located on the upper right side of the screen to open the new ticket window and fill out the required fields in order to open a new helpdesk ticket.



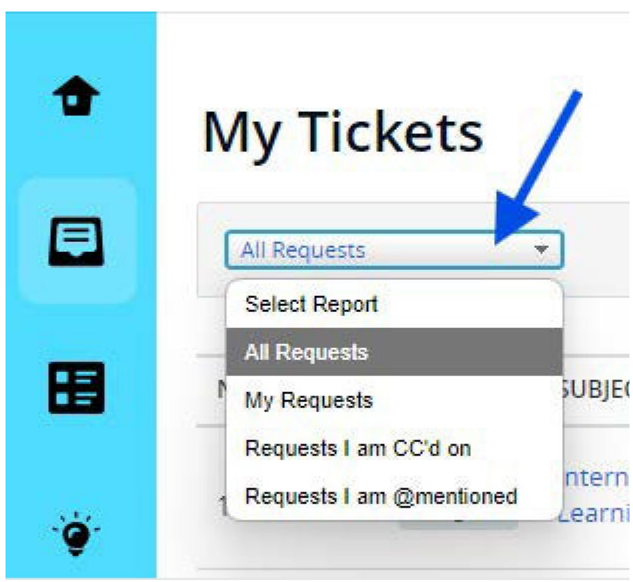
How do I access a service desk ticket already created?

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.

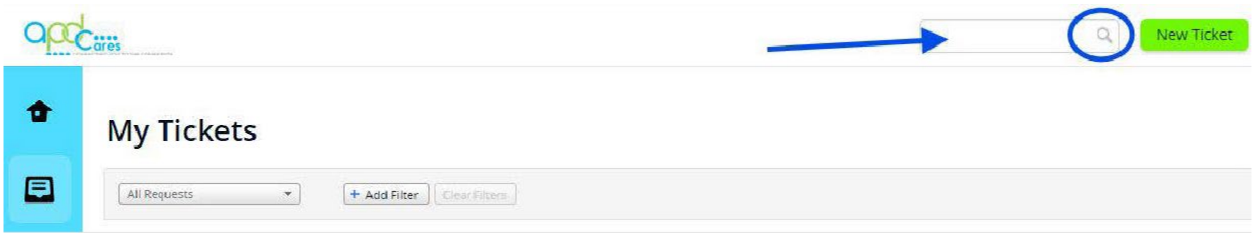
2. Click the ticket icon on the left side of the screen.
    a. If you hover over the ticket icon it will display “My Tickets.”



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.



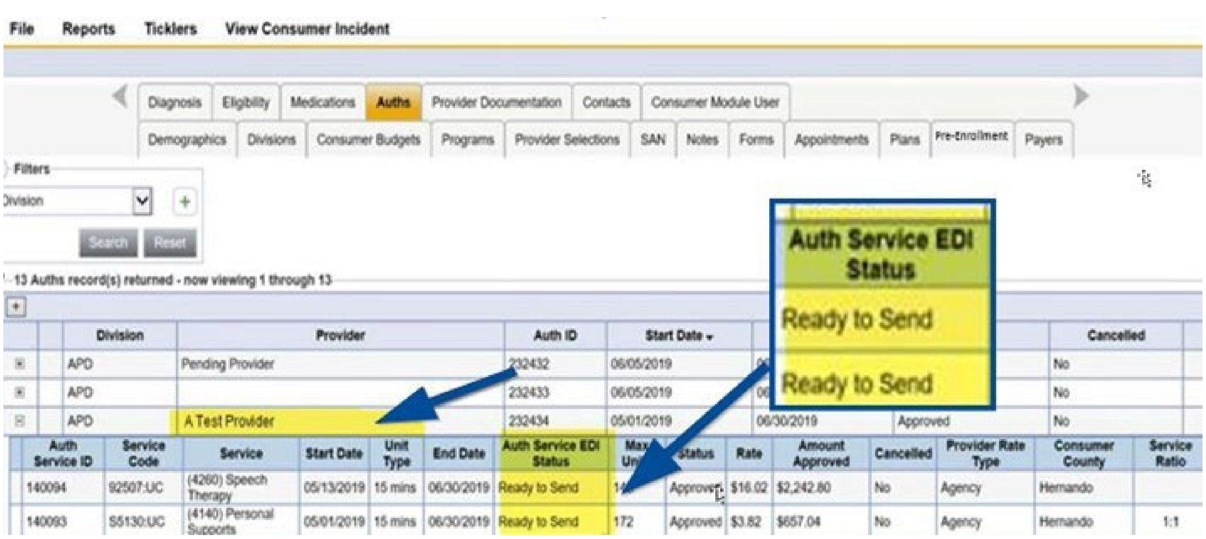
March 1, 2025

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

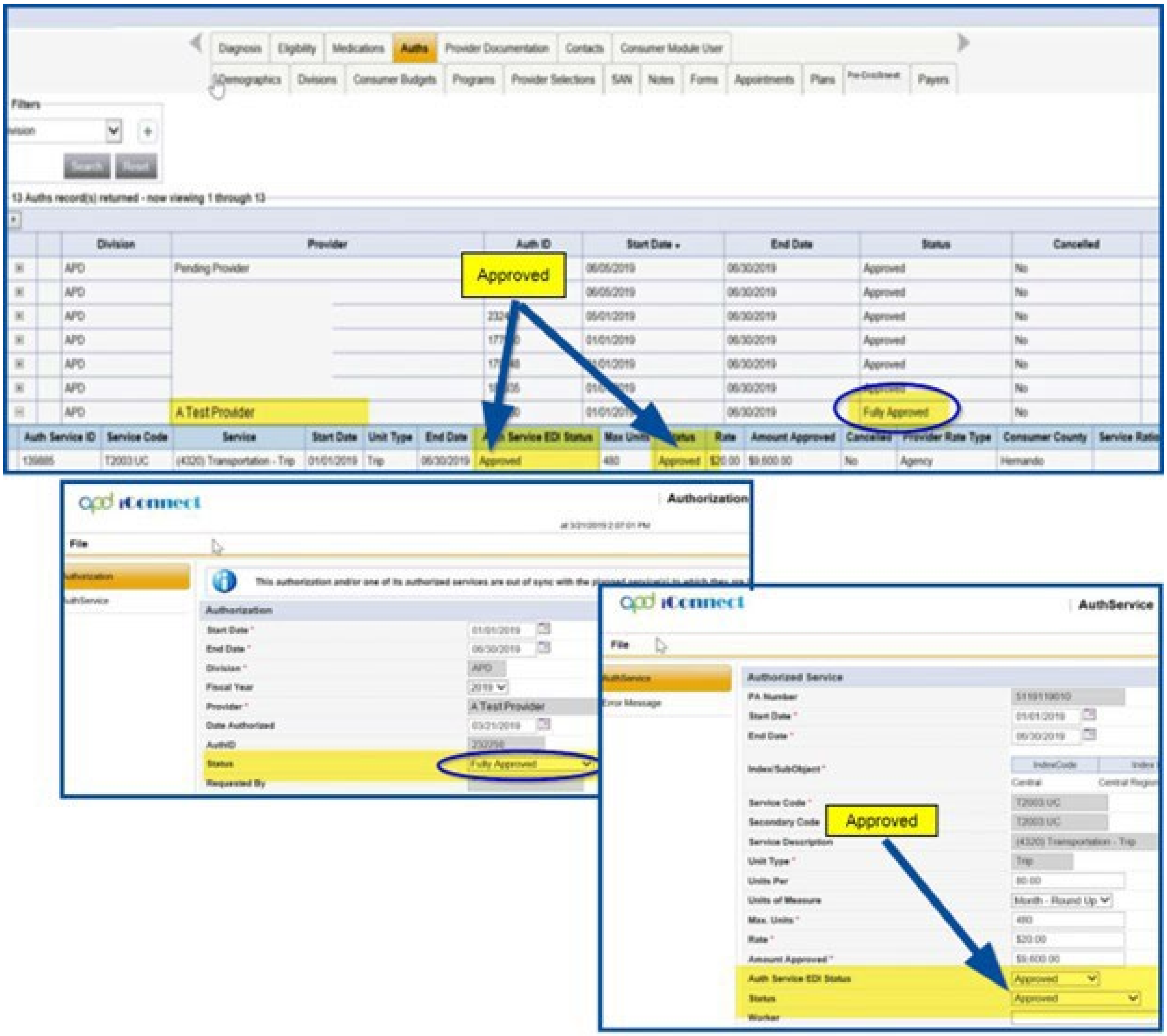
A Waiver Support Coordinator (WSC) initiates the approval process for a service authorization when the WSC creates or updates an existing service authorization in iConnect. This creates a PA number, so that services rendered may be billed. This process involves the iConnect interface with the Florida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



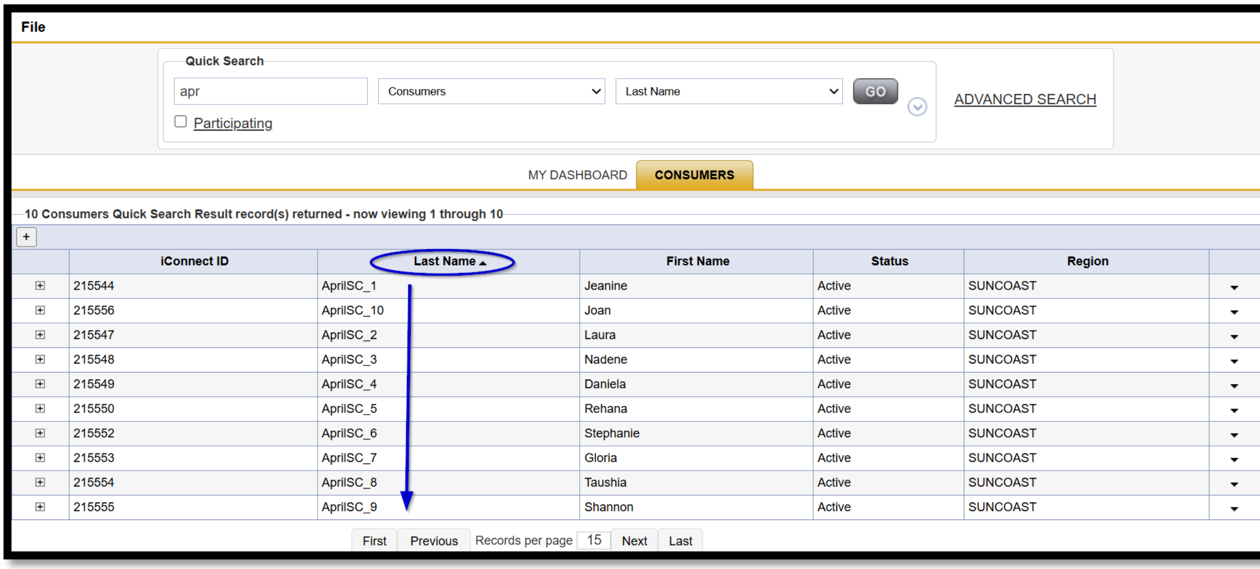
Example from iConnect of an authorization in “Approved” status from the Auth tab, within the list view grid, after opening the authorization, and opening the AuthService tab:



April 1, 2025

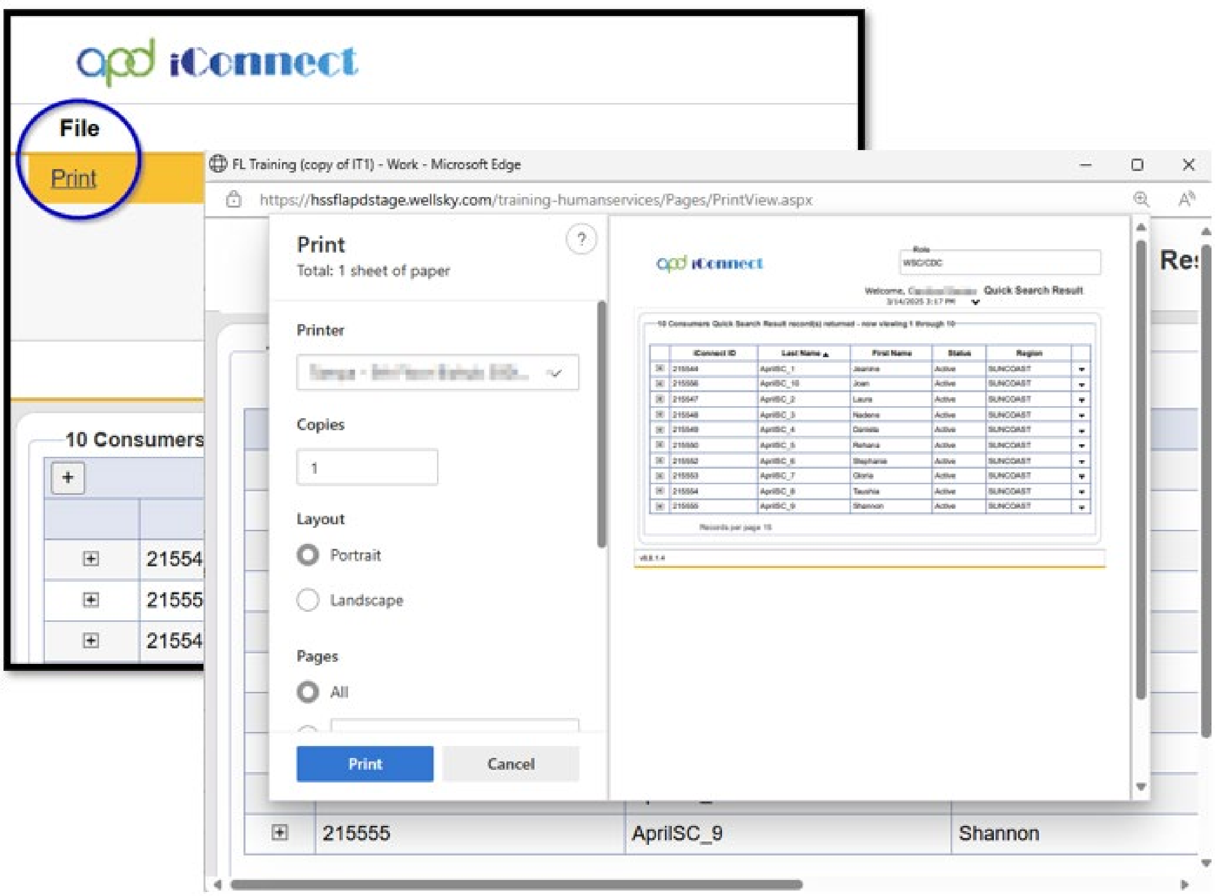
How are the list view grids used in iConnect?

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.



Can iConnect users print the list view grids?

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

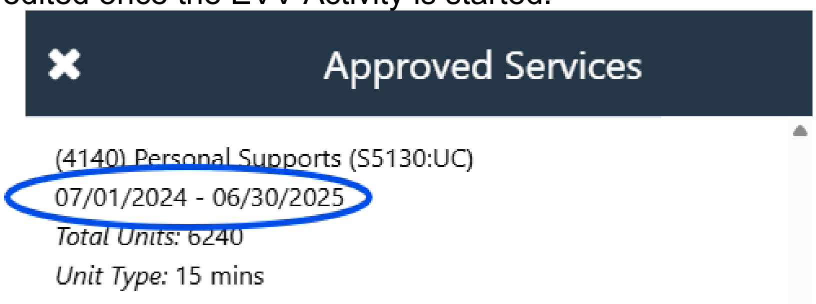


May 1, 2025

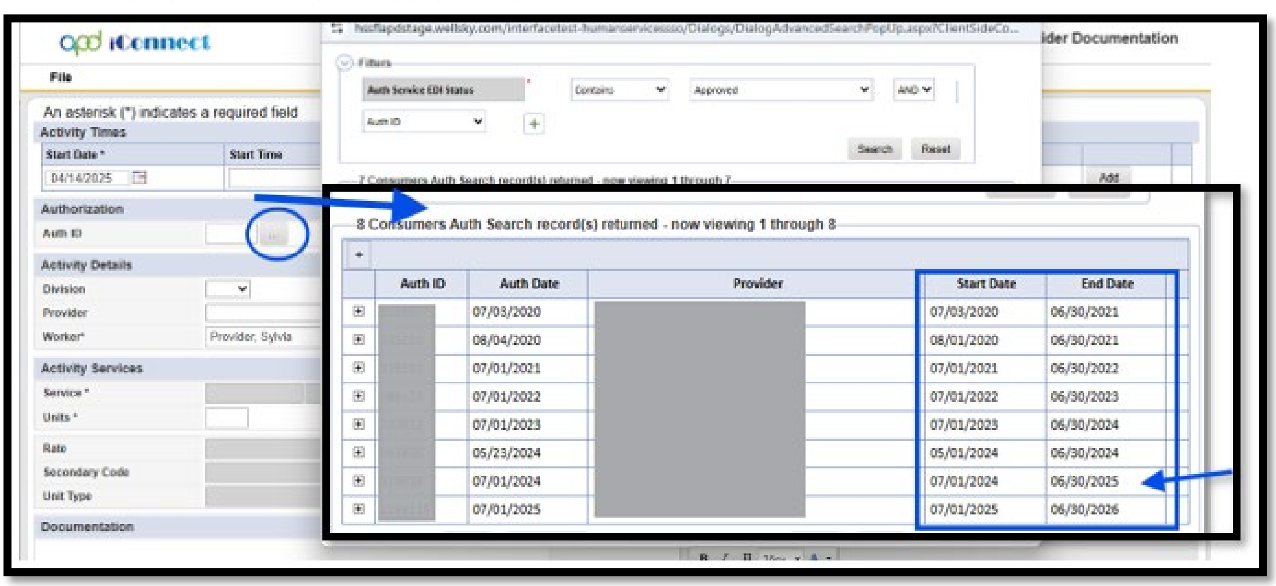
Verifying the dates of a service authorization

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.

<u>EVV Mobile Site</u>
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.



<u>iConnect</u>
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.



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.

586123	07/01/2022	[redacted]	07/01/2022	06/30/2023

Auth Service ID	Service Code	Service	Start Date	End Date	Max Units	Auth Service EDI Status	Max Amount
[redacted]	S5130:UC	(4140) Personal Supports	07/01/2022	06/30/2023	3492	Approved	$19,101.24
[redacted]	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

Auth Service ID	Service Code	Service	Start Date	End Date	Max Units	Auth Service EDI Status	Max Amount
[redacted]	S5130:UC	(4140) Personal Supports	07/01/2023	04/30/2024	[illegible]	Approved	$15,945.05
[redacted]	S5135:UC	(4080) Life Skills Development - Level 1 (Community Inclusion)	07/01/2023	06/30/2024	5222	Approved	$26,475.54

[redacted]	05/23/2024	A[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
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
209640	Sherwin	Danielle	Active	CENTRAL
209646	Sherwin	Julie	Active	CENTRAL
209720	Shim	Brandi	Active	CENTRAL
209956	Shivers	Jill	Active	NORTHEAST
209952	Shivers	Jillian	Active	CENTRAL
209645	Shumate	Delaney	Active	CENTRAL
209865	Sigala	Alexis	Active	SOUTHEAST
215485	Simulation	Barbie	Active	SUNCOAST
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
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
209640	Sherwin	Danielle	Active	CENTRAL
209646	Sherwin	Julie	Active	CENTRAL
209720	Shim	Brandi	Active	CENTRAL
209956	Shivers	Jill	Active	NORTHEAST
209952	Shivers	Jillian	Active	CENTRAL
209645	Shumate	Delaney	Active	CENTRAL
209865	Sigala	Alexis	Active	SOUTHEAST
215485	Simulation	Barbie	Active	SUNCOAST
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.

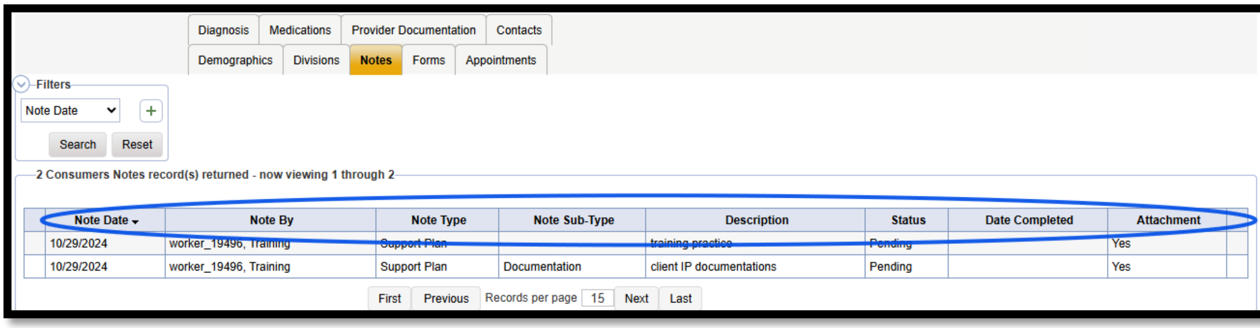
32 Consumers Quick Search Result record(s) returned - now viewing 1 through 15

	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

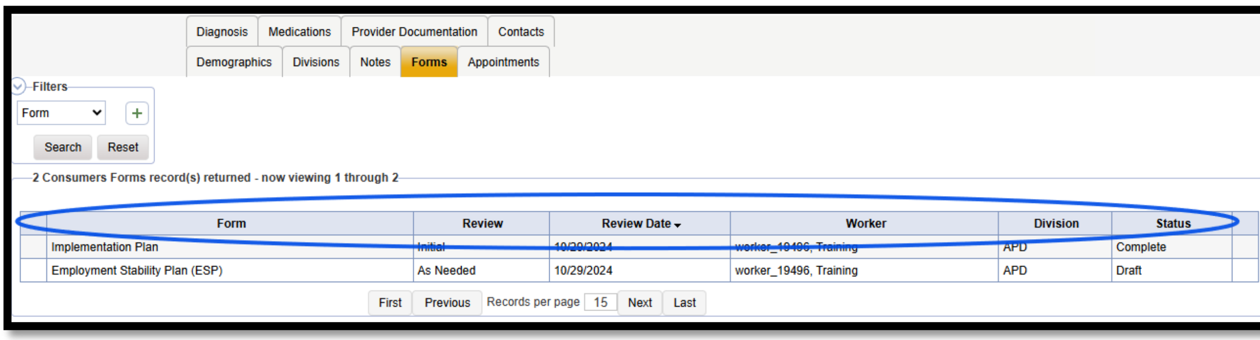
32 Consumers Quick Search Result record(s) returned - now viewing 1 through 15

	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:



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.



July 1, 2025

FMMIS Provider Interface Updates in iConnect

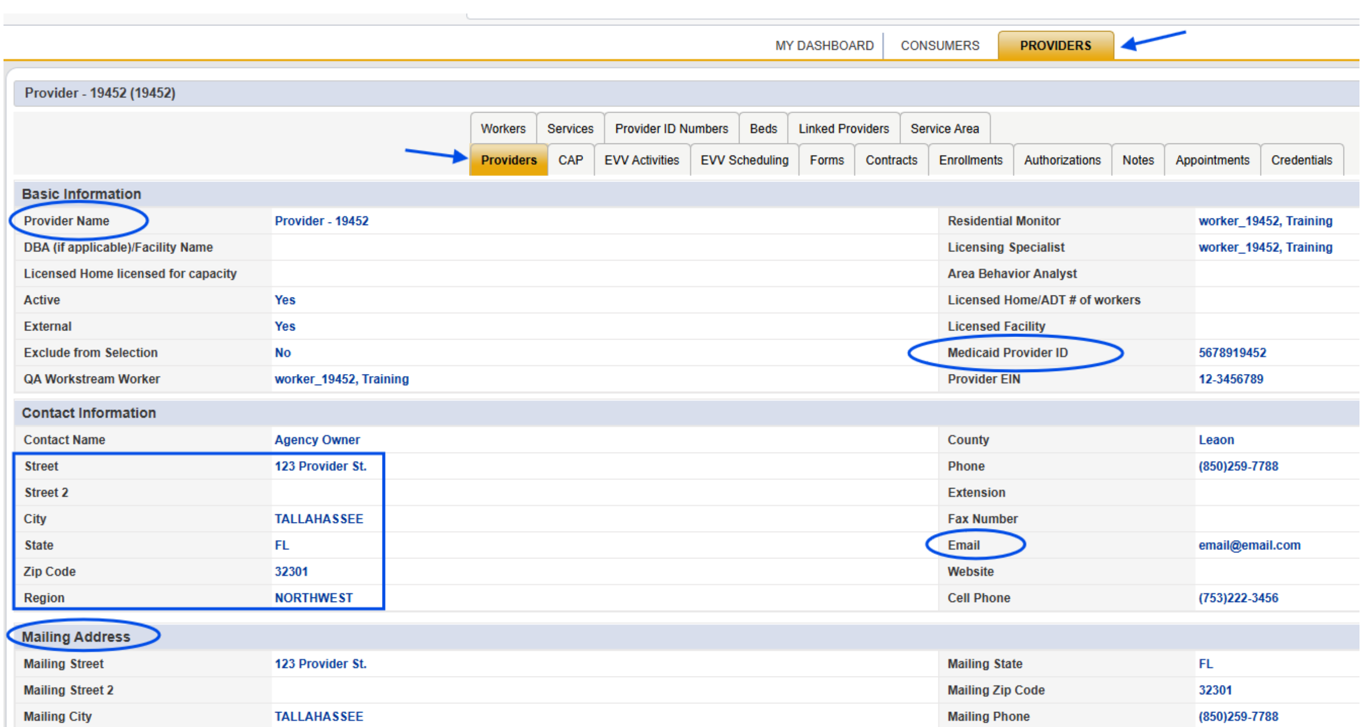
The Florida Medicaid Management Information System (FMMIS) Provider Interface exchanges provider-related data with iConnect so that both systems have up-to-date and synchronized records for service delivery and billing. Some of the data elements that are updated every night by the FMMIS Provider Interface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

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

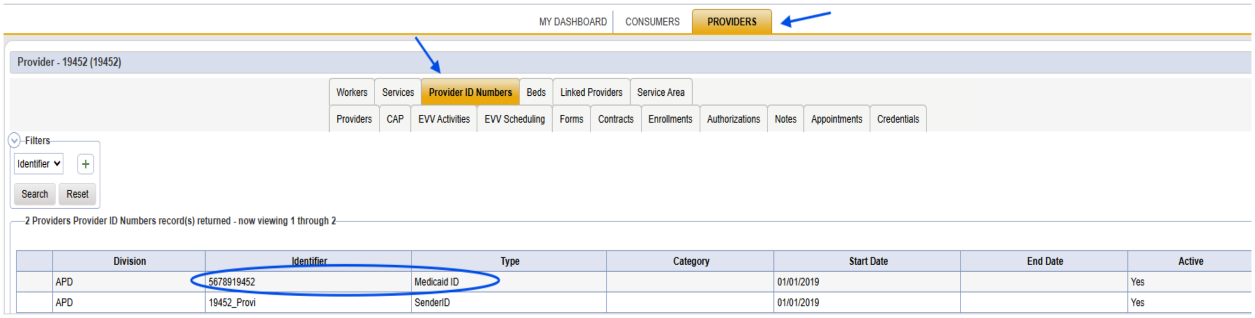
Providers need to edit their information in FMMIS, since the FMMIS Provider Interface will update the Provider's information every night in iConnect. If edits are made directly into iConnect, the FMMIS Provider Interface will override those edits nightly.

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.



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.

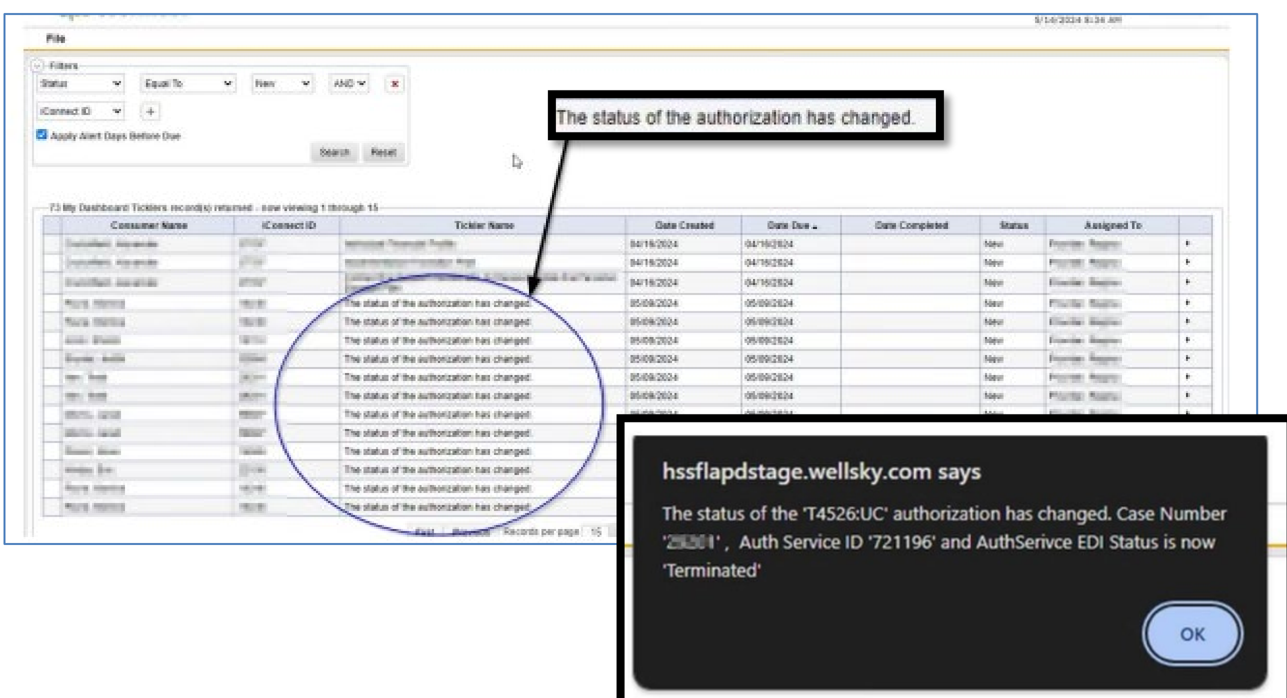


August 1, 2025

Obtaining Notifications of New and Updated Authorizations in iConnect

Receiving notifications of new and updated authorizations in iConnect will enable providers to make the necessary adjustments so that the services being provided are in line with the current authorization. In order to receive notifications of changes or creation of new authorizations, the provider must assign a worker in iConnect to receive the “The status of the authorization has changed.” tickler.

The agency owner or delegate will identify specific worker(s) to obtain the service authorization creation/update ticklers. The identified workers will need to have their worker profile modified. The [Job Aid for Service Authorization Update Ticklers]() will give detailed instructions on how to modify the identify workers’ profiles to obtain the creation/update ticklers.



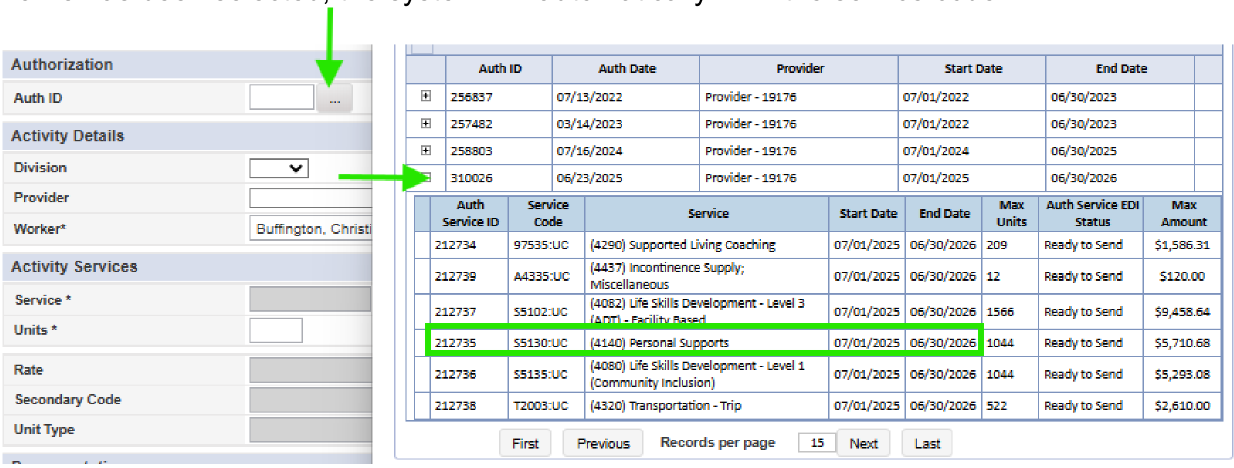
September 1, 2025

Choosing the Correct Authorizations in iConnect

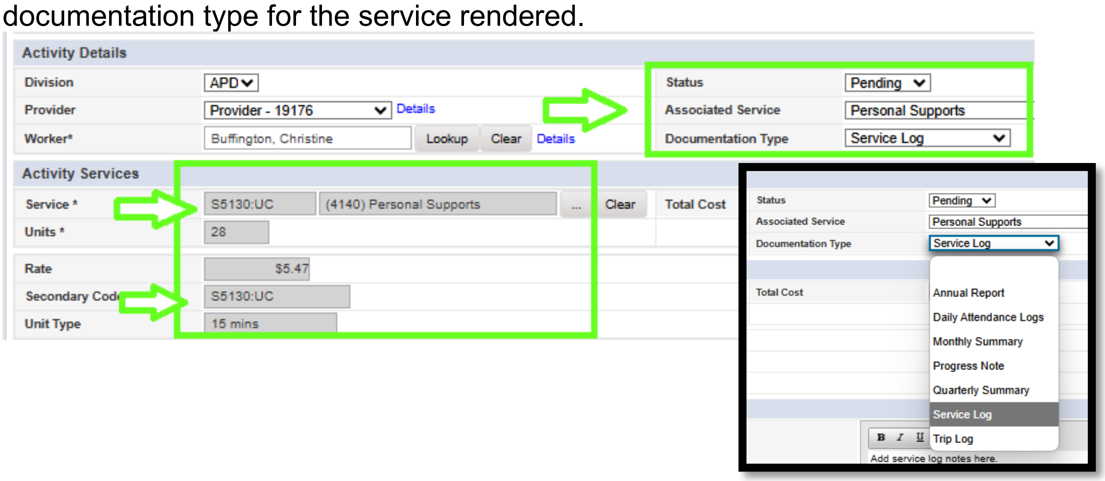
When documenting a service rendered, the worker will need to utilize the correct authorization for the service that they provided. It is imperative that the worker knows what service is being rendered. That will come from the agency owner, supervisor, or designee and as identified within the authorization 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

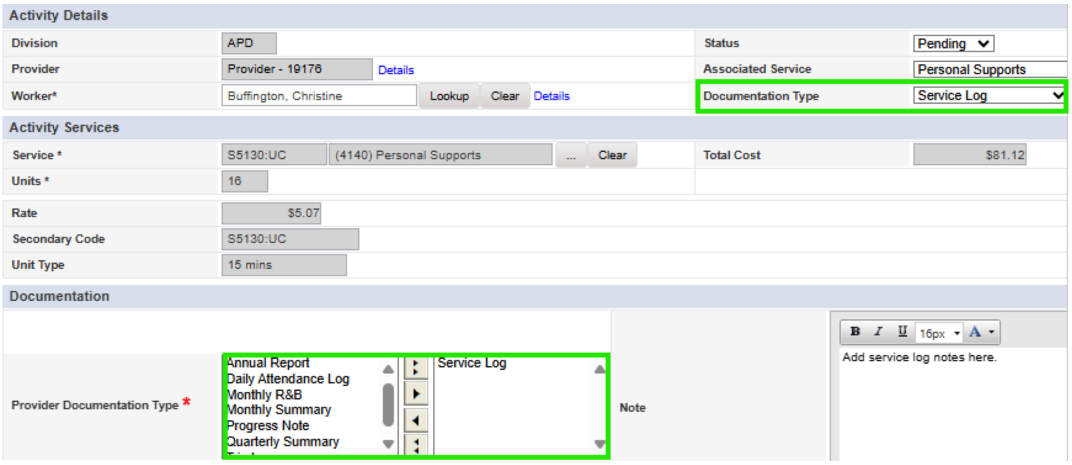
TIP: When pulling the authorization through the ellipsis (**…**), click on the plus (**+**) sign, to bring up all services for the consumer that the provider has an authorization for. Once the service name has been selected, the system will automatically fill in the service code.



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.

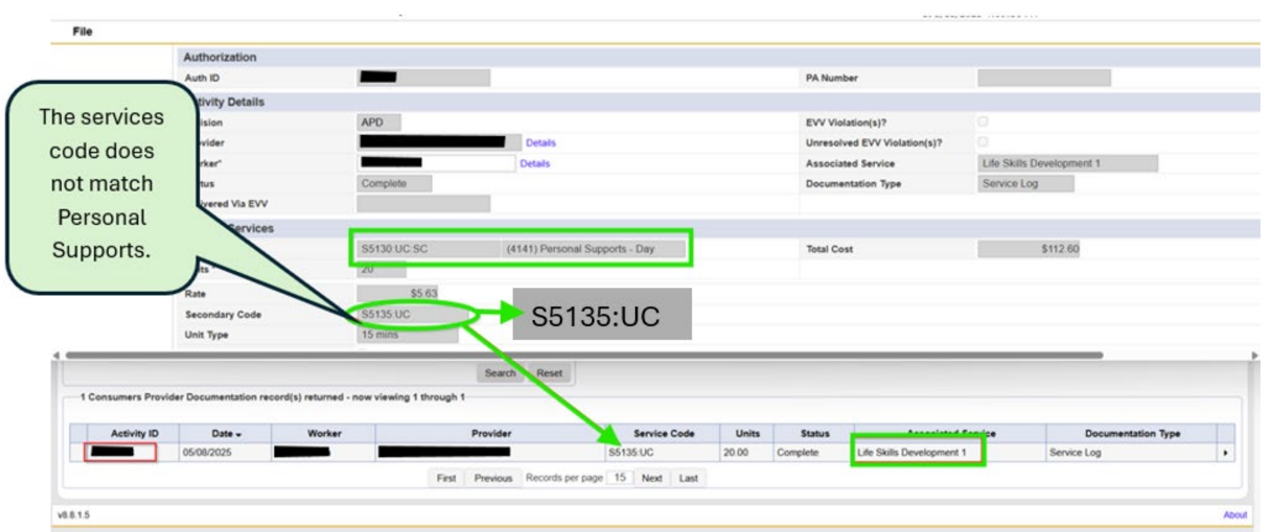


Under the **Documentation** row, the worker will select the correct **Provider Documentation Type** from the selection box, utilizing the arrows to move that documentation type(s) to the right side of the empty box.



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 <u>new provider documentation</u> entry with the data captured along with the correct service.

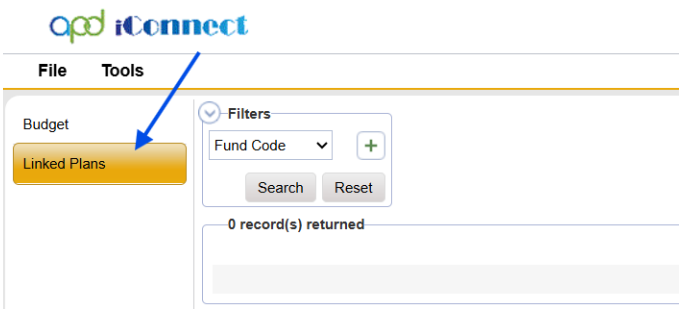
The provider documentation below is an example of a provider documentation that would need to be reentered. The Secondary Code matches the code for Life Skills Development 1; however, the Service listed is Personal Supports Day. This occurred due to the incorrect Service being selected originally and 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.



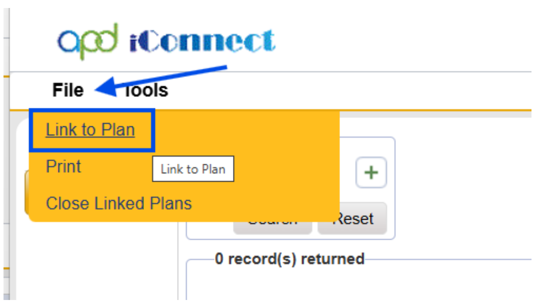
Opening Plans from the Consumer Budgets tab – WSC Edition

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.

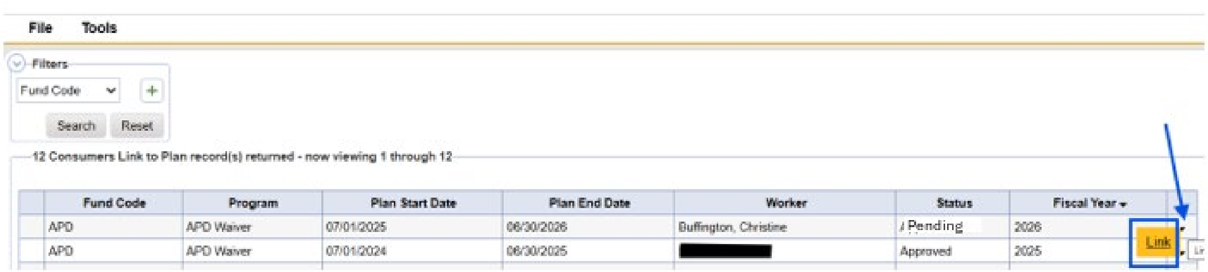
1. The WSC is in the Consumer Budgets tab and the Linked Plan bookmark.



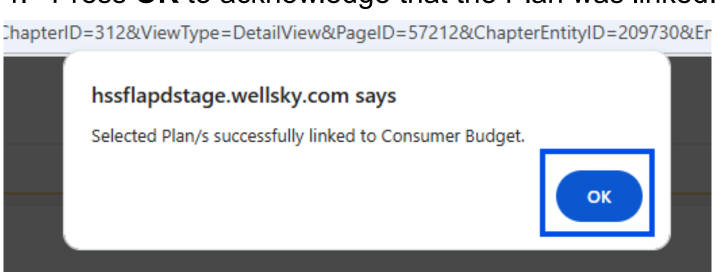
2. Navigate to **File** and select **Link to Plan**.



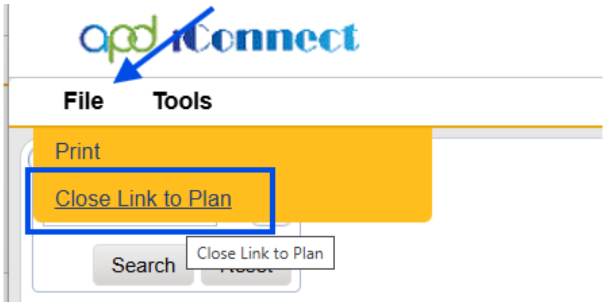
3. Navigate to the appropriate plan from the list view grid and utilize the caret click **Link**.



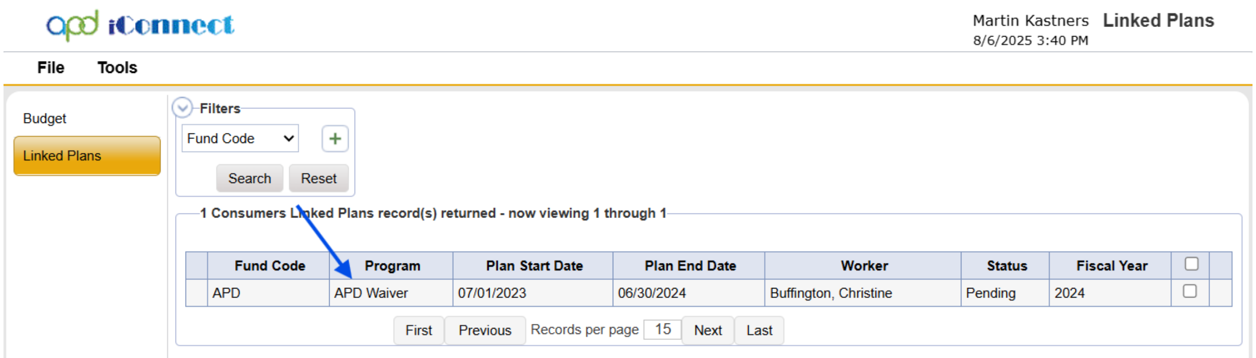
4. Press **OK** to acknowledge that the Plan was linked.



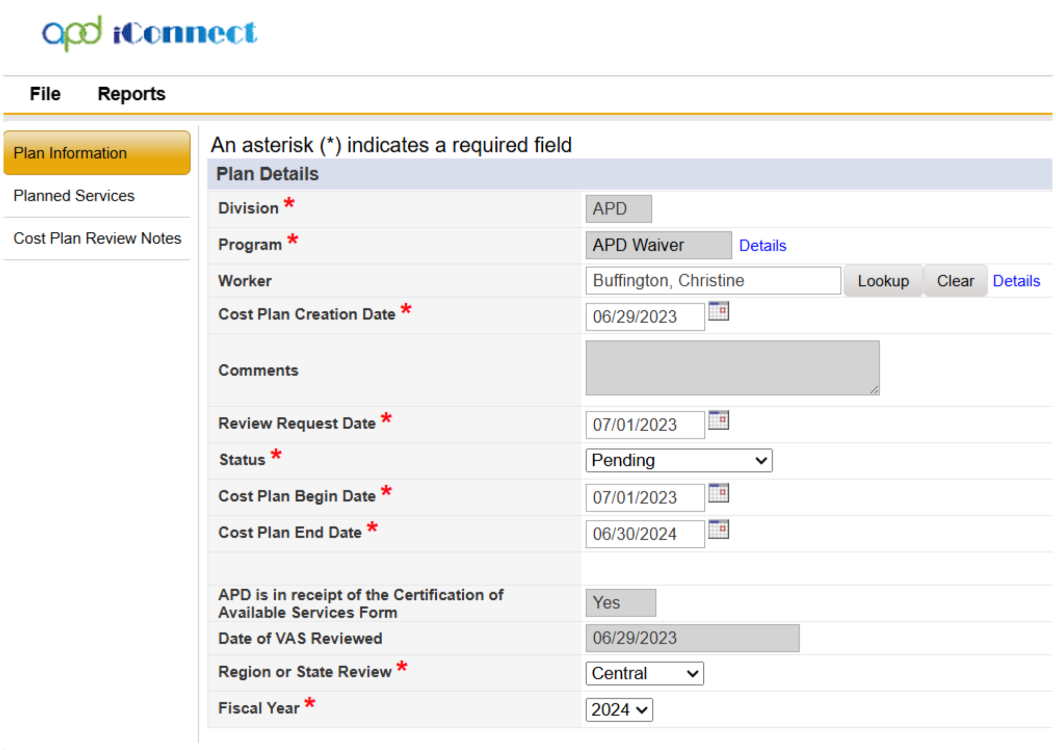
5. Go to **File** and select **Close Link to Plan**.



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

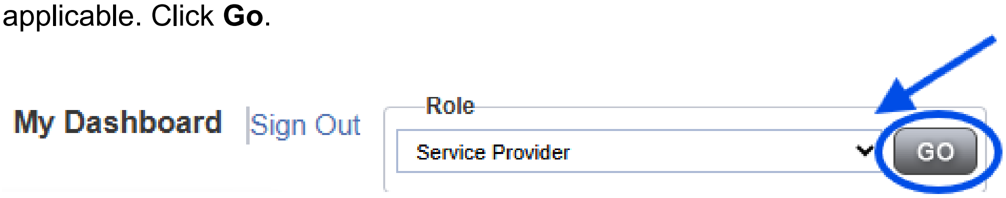
Reviewing Provider Documentation

The Service Provider Documentation Report can assist agency owners and their delegatees 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.

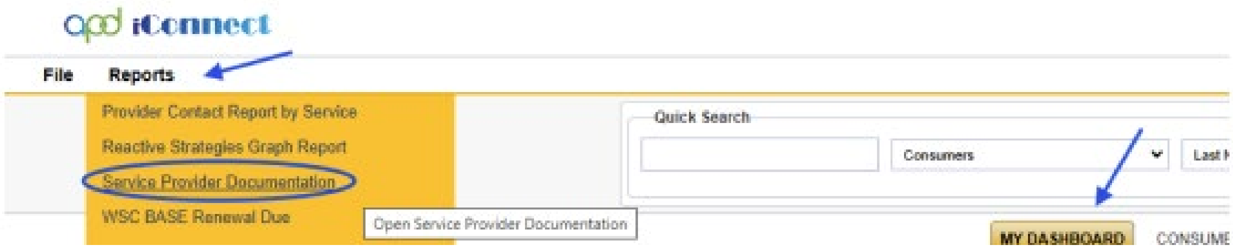
The Service Provider Documentation Report contains the following information:
(Please review the Service Provider Documentation Report Job Aid for any updates to the report.)

- 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

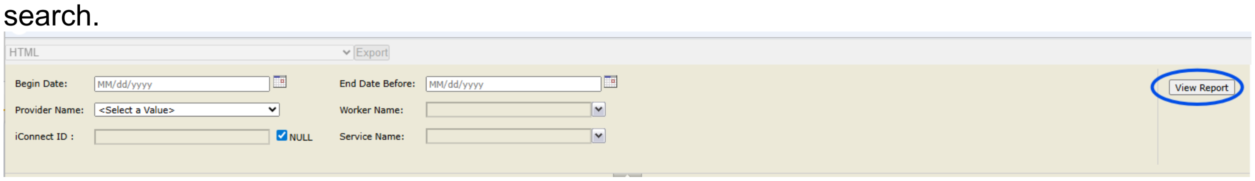
1. To begin, log into iConnect and set Role = Service Provider or Service Provider Worker, as applicable. Click **Go**.



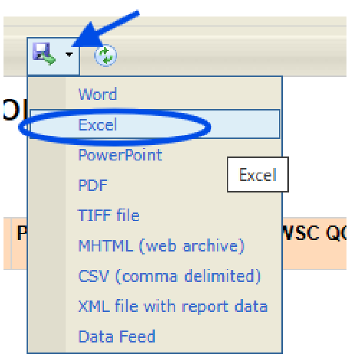
2. On My Dashboard, navigate to the **Reports** menu and select Service Provider Documentation.



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.

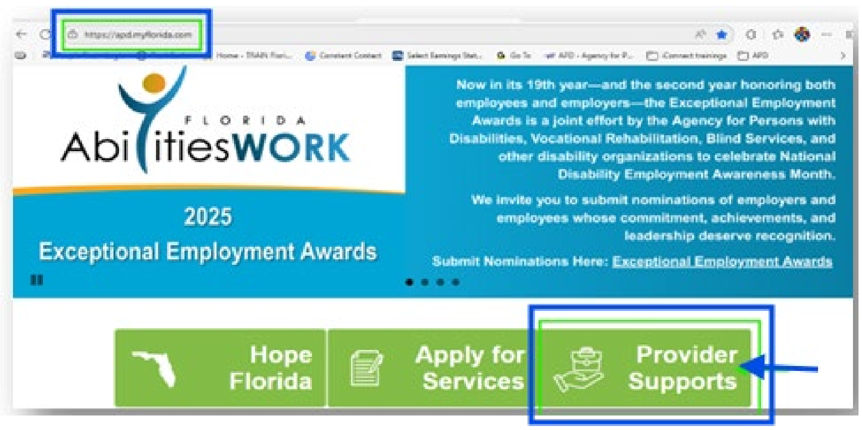
REMINDER: *Personal Health Information (PHI) will be pulled when exporting the Service Provider Documentation Report. It is the responsibility of all iConnect users to ensure that their systems follow all HIPAA requirements.*

November 1, 2025

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

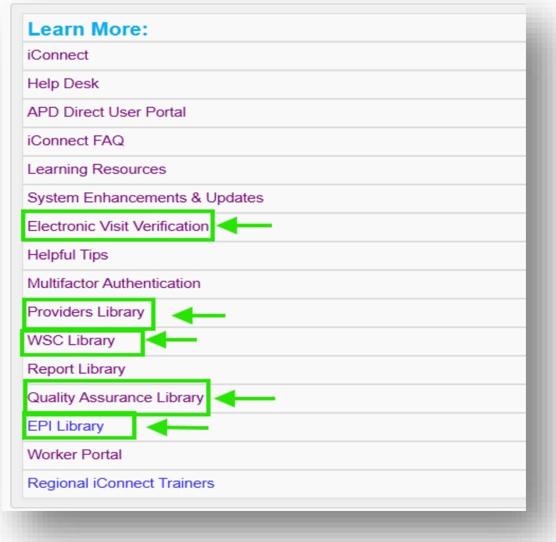
Do you hear the Regional iConnect trainers say, "Let's go look at the manual," but are not certain how they get there so quickly?
Manuals and job aids have been created to assist providers with workflows and procedures in iConnect. At times they are updated to illustrate enhancements made to iConnect. 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

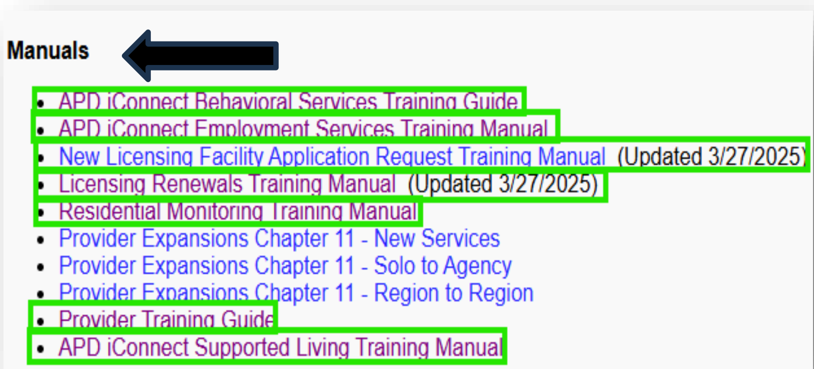


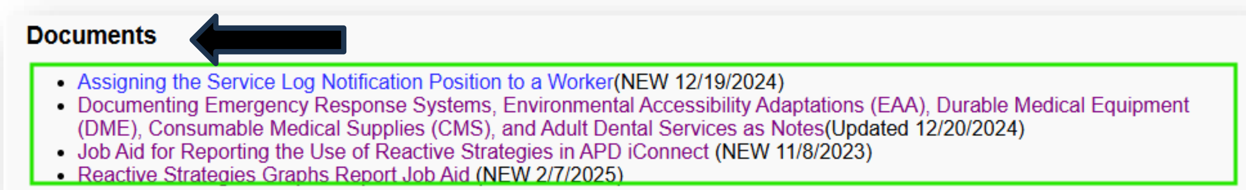
3. Then select **APD iConnect**

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]).



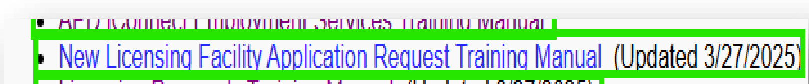
5. Navigate to the **Manuals or Documents** and select the topic that you are interested in, and click on it





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.

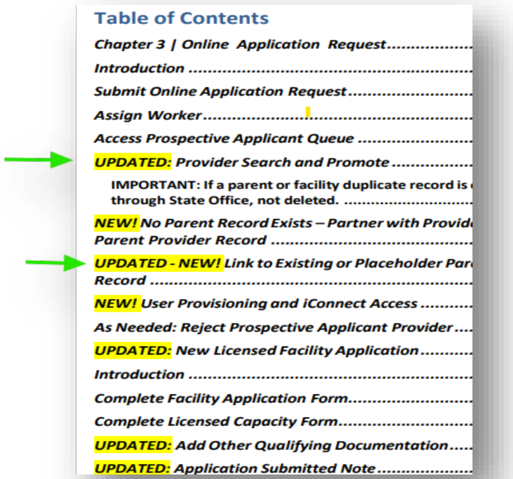


Table of Contents