

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 'iConnect' logo is on the left, and the user's role is 'Service Provider' on the right. The main navigation bar includes 'MY DASHBOARD', 'CONSUMERS', and 'PROVIDERS'. The 'PROVIDERS' tab is selected, showing a list of providers. The 'Workers' tab is also visible. A blue oval highlights the 'Title' field in the 'Workers' tab, which is currently set to 'Provider - 18915'. An arrow points to this field from the right side of the screen. The 'Title' field is part of a form that includes other fields like 'Member ID', 'Last Name', 'First Name', 'Business Address', '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.

apd 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

PA Number

Activity Details

Division: APD Worker*

Provider: Simulation Behavior Provider 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.

apd iConnect

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

Activities

File

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

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

257503 Consumer First Name * Holly

iConnect ID * 209648 Consumer Last Name * Bohl

Activity Details

Need to Update a Record in Complete Status?

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

apd iConnect

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

Notes

File Tools

- History
- Spell Check
- Unlock Record
- Print

APD

Simulation, Behavior

09/19/2023

qpd iConnect

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

Forms

File

History

Duplicate Forms

Reverse Status

Print

Close Forms

Division *

APD

Approved By

Shorter, Caroline

Details

Worker *

Shorter, Caroline

Details

Status *

Complete

Provider/Program *

HelloFreshly

Details

Approved Date

02/15/2024

qpd iConnect

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

Provider Documentation

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

oood iConnect

Welcome, Caroline Shorter Ticklers
2/15/2024 8:50 AM

File

Filters

Ticker Name
 Contains
 Support Plan
 AND
 iConnect ID
 Apply Alert Days Before Due
 Search
 Reset

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

MY DASHBOARD

CONSUMERS

PROVIDER

Division

My Enrollments

Provider Selections

Notes

Complete	1
Pending	6

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.

The screenshot shows the iConnect interface for a consumer record. The consumer is 'Crunch, Capt'n (215479)'. The 'Alert Notes' pop-up window is open, displaying the following information:

Alert Notes: Capt'n Crunch	
NoteDate	02/15/2024
NoteBy	Caroline Shorter
NoteType	Service Provider Supporting Documentation
Subject	Provider Documentation for the month of May
Notes	
Last Updated On	2/15/2024 11:44:24 AM
Last Updated By	caroline.shorter@apdcare.org

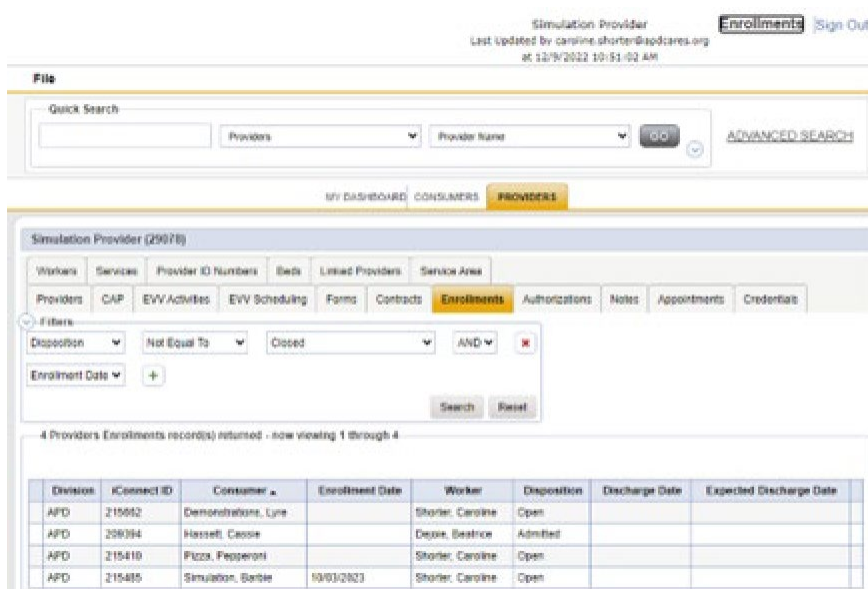
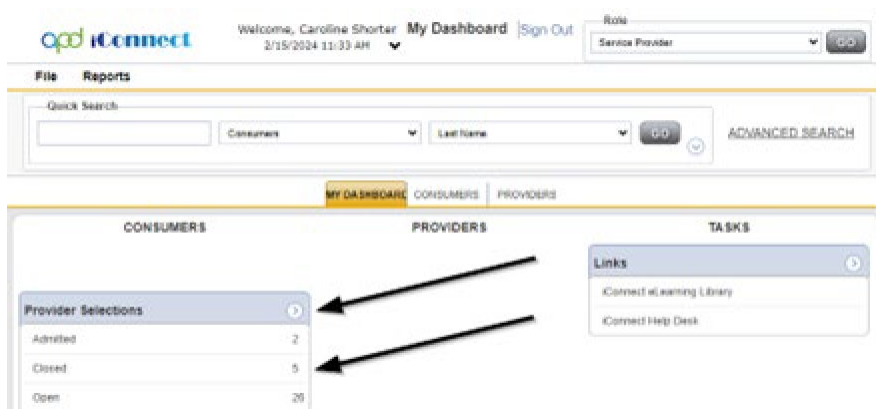
The background interface shows the 'Demographics' tab selected, with fields for iConnect ID, Salutation, Last Name, First Name, Consumer Photo, Marital Status (Single/Never Married), and Living Setting (Family Home).

The screenshot shows the iConnect interface with a 'Status' dropdown menu open. The dropdown menu has the following options: Alert, Pending, Complete, Draft, and Draft. The 'Complete' option is selected and highlighted with a blue circle. An arrow points to the 'Complete' option. The background interface shows the 'Notes' tab selected, with a search bar and a list of tasks.

June 1, 2024

Need to Know There Is A Provider Selection for Your Organization

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



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

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

File Tools

Notes

An asterisk (*) indicates a required field

Notes Details

Division *	APD
Note By *	Provider, Sylvia
Note Date *	02/19/2024
Program/Provider	1 CARE LLC Details
Note Type *	Supported Living *
Note Sub-Type	Signed Implementation Plan
Description	Signed Implementation Plan
Note	On 2/19/2024 at 10:04 AM, Sylvia Provider wrote: Notes
Status *	Draft
Date Completed	

opd iConnect

File Tools

Notes

An asterisk (*) indicates a required field

Notes Details

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

How To Know if Notes Have Been Read

If you want to ensure a Note has been “Read,” navigate to the Notes Tab of the record you want to verify (Provider Notes will be in the Provider Record and Consumer Notes will be in the Consumer Record). Open the Note and scroll down until you come to the Note Recipients. Listed under the Note Recipients you will see a list 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:			Clear		
Name	Date Sent	Date Read	Status	Date Signed	
Appleton, Susan	02/19/2024		Unread		Remove
Baer, Sylvia	08/30/2022	02/19/2024	Read		
Baer, Sylvia	2/19/2024		Unread		Remove

How To Get Rid of Ticklers On Your Dashboard

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


Welcome, Caroline Shorter
3/5/2024 2:44 PM
Ticklers

File

Filters

Status

Equal To

New

AND

iConnect ID

☒ Apply Alert Days Before Due

232 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
Cals, 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, Cap'n	215475	Initiate and/or Update the Cost Plan	02/08/2022	02/08/2022		New	

Cancel

Complete

View Consumers Record

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.



About	Contacts	Reviews	Resources	Discharge	Communications
Resource					Date Posted
APDiConnectTherapeuticProviderScript.pdf					27 Feb 2023
APDiConnectTherapeuticSimulationAid.pdf					8 Feb 2024
ProviderDocumentationJobAid.pdf					8 Feb 2024
AssessmentsJobAid.pdf					8 Feb 2024

July 1, 2024

Attaching Documents From Outside of iConnect

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

iConnect

Barbie Simulation Notes

3/12/2024 12:19 PM

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

File Upload Form - Work - Microsoft Edge

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

File

Choose File

LOCK.DOC.docx

File Name

from uploaded file

create new

Description

Category

Upload

Upload and Add Another

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

Description

Category

Action

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 Code *

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

Service Ratio

Consumer County * HILLSBOROUGH

Geographic Differential * Non-Geographic

Provider Rate Type * Agency

Service Code * G9012 UC

Service Description (4276) Support Coordination

Unit Type Month

Units Per * 1

Units of Measure * Month - Round Up

File

Service Description (4276) Support Coordination

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 (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

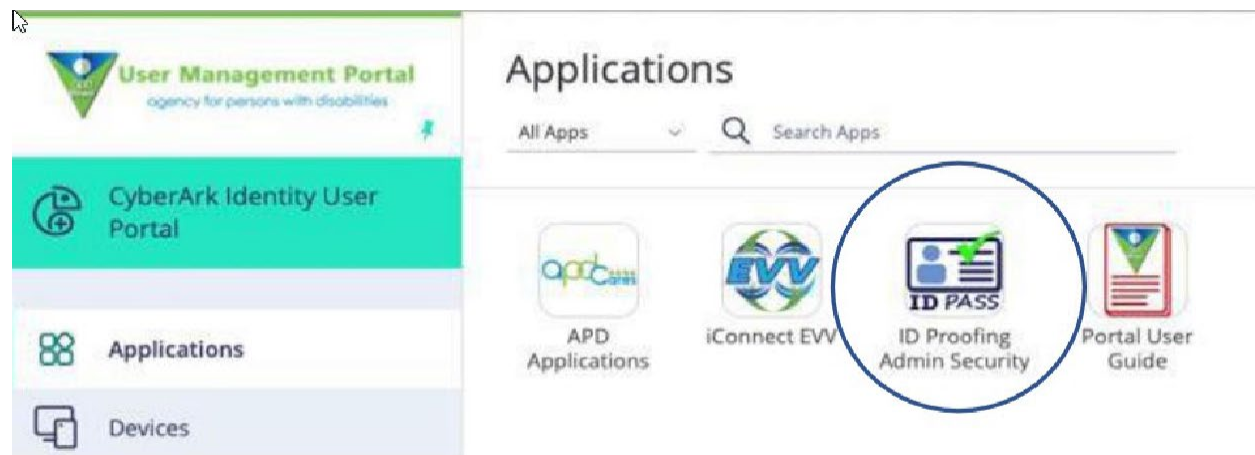
Worker Name +

Search Reset

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

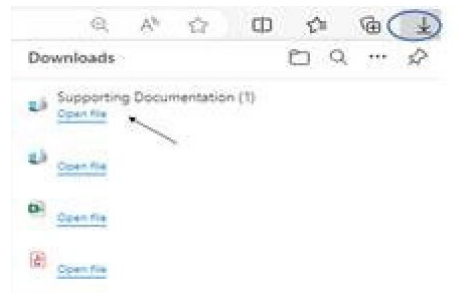
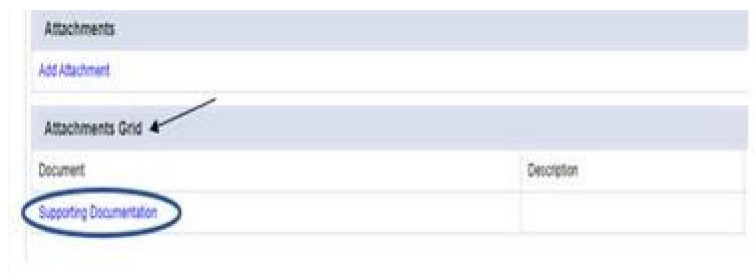
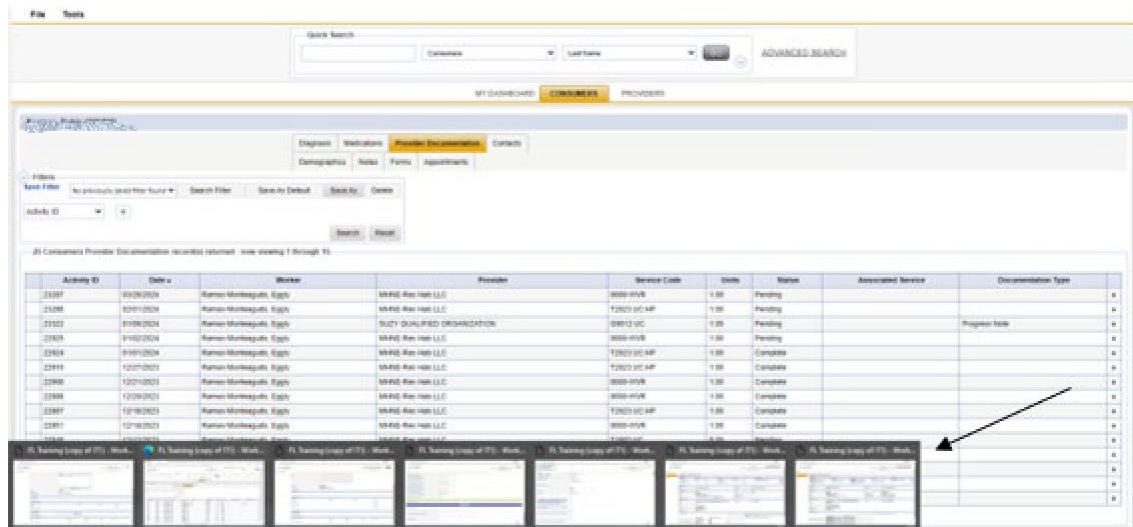
Worker Name	Title	Phone Number
Katie Hinkle		
Shirley Hinkle	iConnect System Administrator	916-520-0100
Shirley Hinkle		
Shirley Hinkle		

First Previous Records per page 15 Next Last



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.

The image illustrates the process of navigating through the iConnect system to find a client's WSC details. It consists of four numbered steps:

- Step 1:** The main iConnect dashboard. The 'Divisions' tab is highlighted in the top navigation bar.
- Step 2:** The 'Divisions' list view. A table displays the following data:

Division	Disposition	Primary Worker	Secondary Worker
APD	APD Eligible - Waiver	WSC, Sylvia	Sheridan, Regina
- Step 3:** A pop-up window titled 'An asterisk (*) indicates a required field'. It shows details for the 'APD Eligible - Waiver' division. The 'Primary Worker' is listed as 'WSC, Sylvia' with a 'Details' link next to it.
- Step 4:** A 'Harmony Entity Viewer' window showing detailed information for the Primary Worker (WSC, Sylvia). The details include:

Member ID	25764
Last Name	WSC
First Name	Sylvia
Title	
Business Address	5100 W KENNEDY BLVD STE 152
City	TAMPA
State	FL
Zip Code	33609
Business Phone	(855)555-5555
Extension	
Fax Number	
Business Email	sylvia25764@email.com
Start Date	
End Date	
Supervisor	
Active	True

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.

Blonde Simulation Forms
3/15/2024 6:07 PM

File

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

4000 characters remaining

Blonde Simulation Provider Documentation
3/15/2024 6:10 PM

File

Activity Details

Division

Worker*

Provider

Status

Shorter, Caroline

Pending

Lookup

Clear

Details

Activity Services

Service *

Units *

Rate

Secondary Code

Unit Type

Clear

Total Cost

Documentation

Provider Documentation Type *

Annual Report

Daily Attendance Log

Monthly R&B

Monthly Summary

Progress Note

Quarterly Summary

Service Log

Note

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

Search

Home

Add

Name

Department

Requester Type

Requester Phone

Consumer Connect ID

Provider Connect 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)

Demographics Sign Out

File Edit Tools Reports Ticklers Word Merge

Quick Search

Consumers Last Name

ADVANCED SEARCH

Simulation, Barbie (215488)

File Edit Tools Reports Ticklers Word Merge

File

Add Ticklers Detail

Close Ticklers

Apply Alert Days Before Due

An asterisk (*) indicates a required field

Manual Tickler

Tickler

Self Generated Reminder

Quarterly

Date Due

06-08-2024

Assigned To

Shooter, Caroline

Message

Victim

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 Ticklers interface. On the left is a sidebar with 'File' and 'Reports' tabs. The main area has a 'Filters' section with dropdowns for 'Status', 'Equal To', 'New', and 'AND'. Below these are 'iConnect ID' and 'Apply Alert Days Before Due' checkboxes, and 'Search' and 'Reset' buttons. A table below shows '232 My Dashboard Ticklers record(s) returned - now viewing 1 through 15'. The table has columns: Consumer Name, iConnect ID, Tickler Name, Date Created, Date Due, Date Completed, Status, and Assigned To. An arrow points to the 'Tickler Name' header, which has a small downward arrow (▼) indicating it is the current sort order.

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 Canales
Moblaris, Evelyn	215423	Waiver Eligibility Worksheet Reminder	03/02/2022	03/02/2023		New	Sharon Canales

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

This close-up shows the 'Filters' dropdown menu. It lists various fields: Status, iConnect ID, Tickler Name, First Name, Last Name, Date Created, Date Due, Date Completed, and Assigned To. The 'Date Due' field is highlighted with a blue box and a small upward arrow (▲), indicating it is the current sort order. An arrow points to the 'Date Due' field in the list.

Consumer Name	iConnect ID	Tickler Name	Date Created	Date Due	Date Completed
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 application interface. At the top, the logo 'apd iConnect' is on the left, and the title 'Blonde Simulation' with a subtitle 'Last Updated by caroline.shorten@apdcare.org at 2/13/2024 8:37:08 AM' is on the right. The main title 'Provider Documentation' is in a box on the right. The 'File' menu is open on the left, 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 'Delete Provider Documentation' in the 'Activity Services' section. The 'Activity Details' section shows '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', 'Secondary Code: 0000-WVR', and 'Unit Type: Units'. The 'Documentation' section is at the bottom.

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

PA Number

Activity Details

Division: APD

Provider: Simulation Behavior Provider

Worker*: Simulation Behavior

Status: Pending

Activity Services

Service #: 0000-WVR

Units #: 1.00

Rate: \$0.00

Secondary Code: 0000-WVR

Unit Type: Units

Documentation

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: 257949 PA Number:

Activity Details

Division: APD Worker*: Shorter, Caroline Lookup Clear Details

Provider: Simulation Behavior Provider Status: Pending

Activity Services

Service*: [dropdown] Total Cost: \$0.00

Units*: 4

Rate: [dropdown]

Secondary Code: [dropdown]

Unit Type: [dropdown]

Documentation

Provider Documentation Type *

Annual Report
Daily Attendance Log
Monthly S&M
Monthly Summary
Progress Note
Quarterly Summary
Toolbox

Service Log

Note

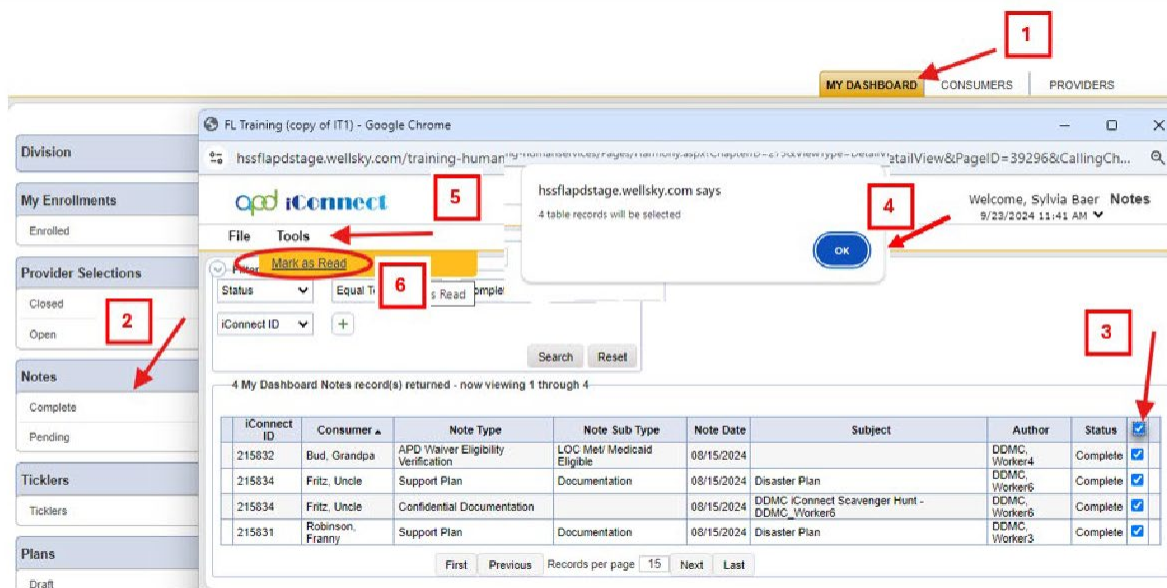
November 1, 2024

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.



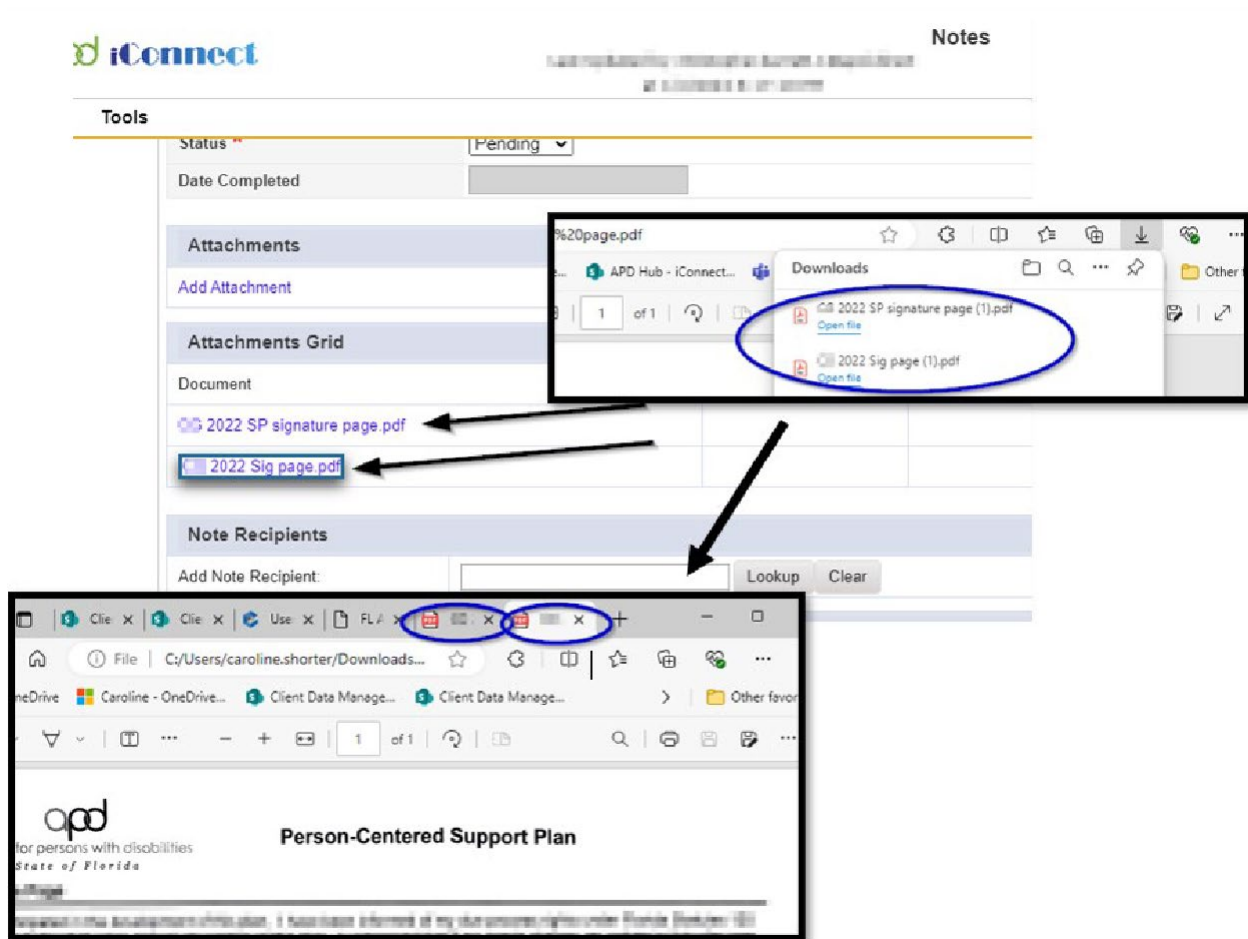
December 1, 2024

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?

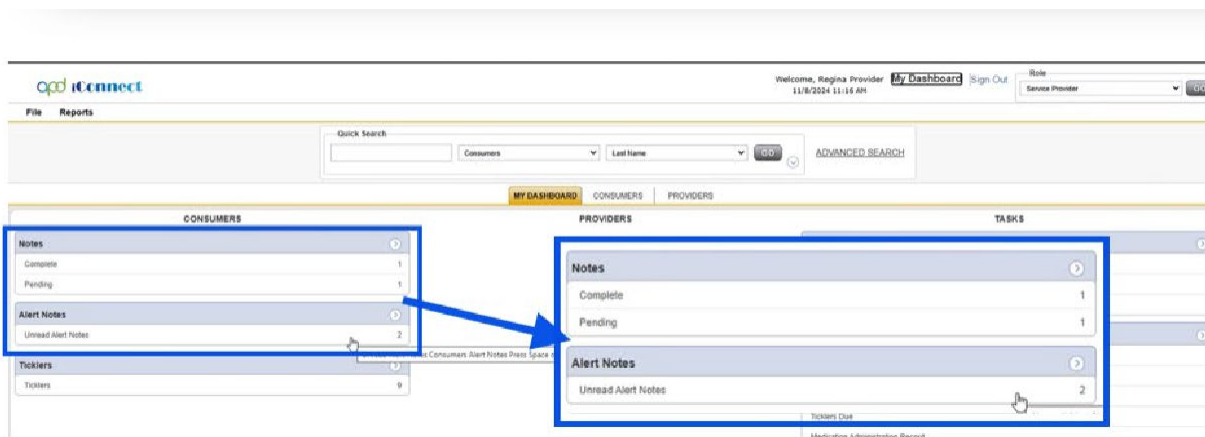
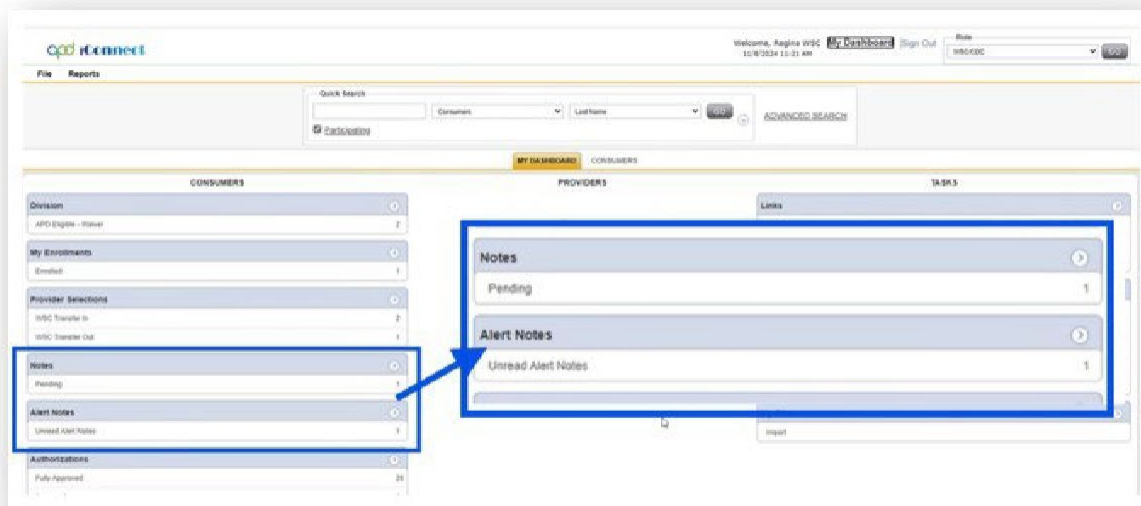
No, when the user clicks on one attachment, the file will download onto their device, so the user can open multiple files at one time by downloading all the files and opening them from the device. This allows for multiple documents to remain open at the same

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.

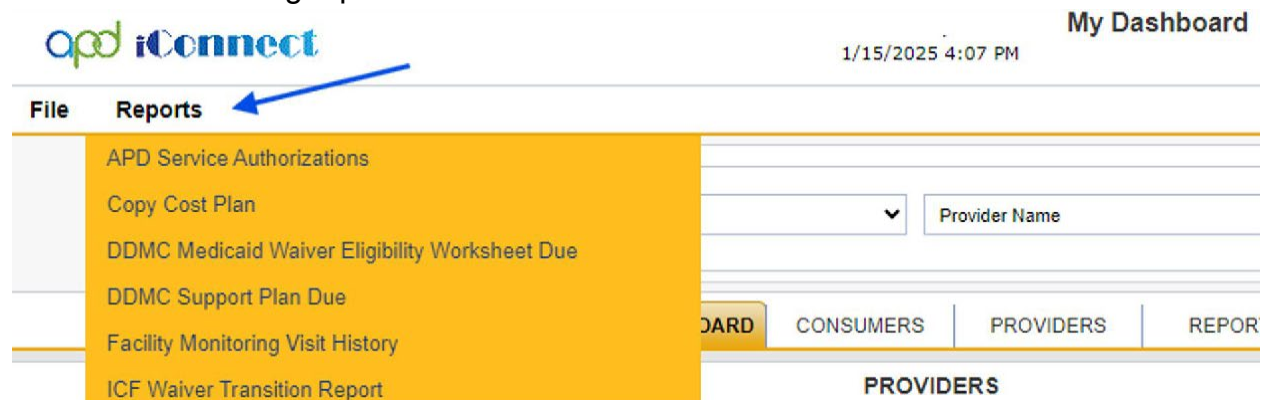


February 1, 2025

Where do I find reports in iConnect?

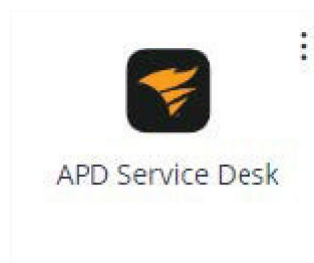
Reports are found in different screens within iConnect depending on their usage and workflow. Locate the Reports menu dropdown on the screen to see what reports are available for you to use. Remember to refer to the job aids available for detailed

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.

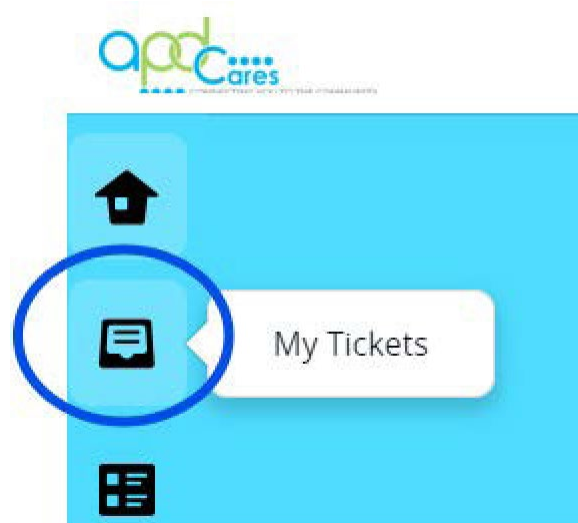


How do I access a service desk ticket already created?

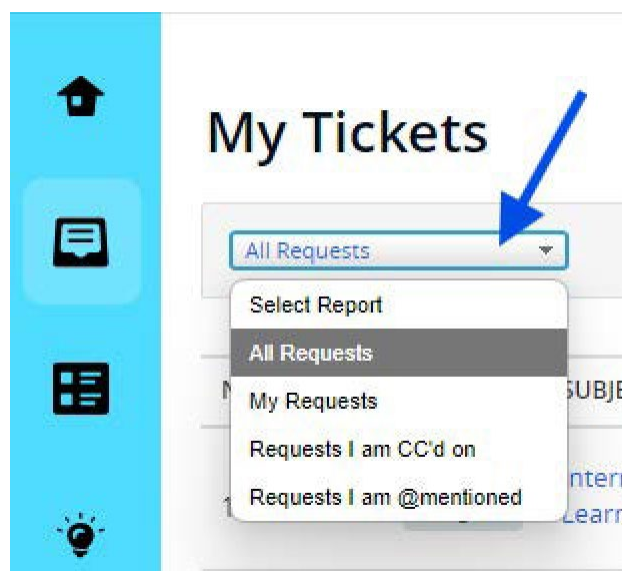
1. Sign into the user portal (aka CyberArk) and click on the “APD Service Desk” icon.
 - a. Click on the icon to open the application.



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.



-

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

- 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.

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 Pre-enrollment Payers

Filters

Division

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

Division	Provider	Auth ID	Start Date	End Date	Auth Service EDI Status	Max Unit	Status	Rate	Amount Approved	Cancelled	Provider Rate Type	Consumer County	Service Ratio
APD	Pending Provider	232432	06/05/2019	06/30/2019	Ready to Send	14	Approved	\$16.02	\$2,242.80	No	Agency	Hernando	1:1
APD		232433	06/05/2019	06/30/2019	Ready to Send	14	Approved	\$16.02	\$2,242.80	No	Agency	Hernando	1:1
APD	A Test Provider	232434	05/01/2019	06/30/2019	Ready to Send	172	Approved	\$3.82	\$657.04	No	Agency	Hernando	1:1

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

The top screenshot displays a list view grid for Authorizations. The grid includes columns for Division, Provider, Auth ID, Start Date, End Date, Status, and Cancelled. A row for 'A Test Provider' is highlighted, showing an 'Approved' status. A yellow box labeled 'Approved' points to this row. The bottom-left screenshot shows the 'Authorization' form with fields for Start Date, End Date, Division, Provider, Date Authorized, AuthID, Status (set to 'Fully Approved'), and Requested By. A yellow box labeled 'Fully Approved' points to the Status field. The bottom-right screenshot shows the 'AuthService' form with fields for Authorized Service, PA Number, Start Date, End Date, Index/Sub-Object, Service Code, Secondary Code, Service Description, Unit Type, Units Per, Units of Measure, Max. Units, Rate, Amount Approved, Auth Service EDI Status (set to 'Approved'), Status (set to 'Approved'), and Worker. A yellow box labeled 'Approved' points to the Auth Service EDI Status field.

April 1, 2025

How are the list view grids used in iConnect?

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

File

Quick Search
 Consumers [ADVANCED SEARCH](#)
☐ Participating

MY DASHBOARD **CONSUMERS**

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

	iConnect ID	Last Name ▲	First Name	Status	Region	
☐	215544	AprilSC_1	Jeanine	Active	SUNCOAST	▼
☐	215556	AprilSC_10	Joan	Active	SUNCOAST	▼
☐	215547	AprilSC_2	Laura	Active	SUNCOAST	▼
☐	215548	AprilSC_3	Nadene	Active	SUNCOAST	▼
☐	215549	AprilSC_4	Daniela	Active	SUNCOAST	▼
☐	215550	AprilSC_5	Rehana	Active	SUNCOAST	▼
☐	215552	AprilSC_6	Stephanie	Active	SUNCOAST	▼
☐	215553	AprilSC_7	Gloria	Active	SUNCOAST	▼
☐	215554	AprilSC_8	Taushia	Active	SUNCOAST	▼
☐	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.

oqd iConnect

File
Print

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

Print
Total: 1 sheet of paper

Printer

Copies

Layout
☒ Portrait
☐ Landscape

Pages
☒ All

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

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

Records per page 15

215555 AprilSC_9 Shannon

May 1, 2025

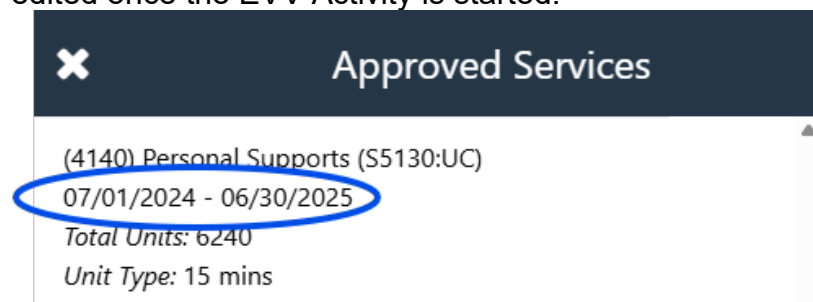
Verifying the dates of a service authorization

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

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

EVV Mobile Site

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

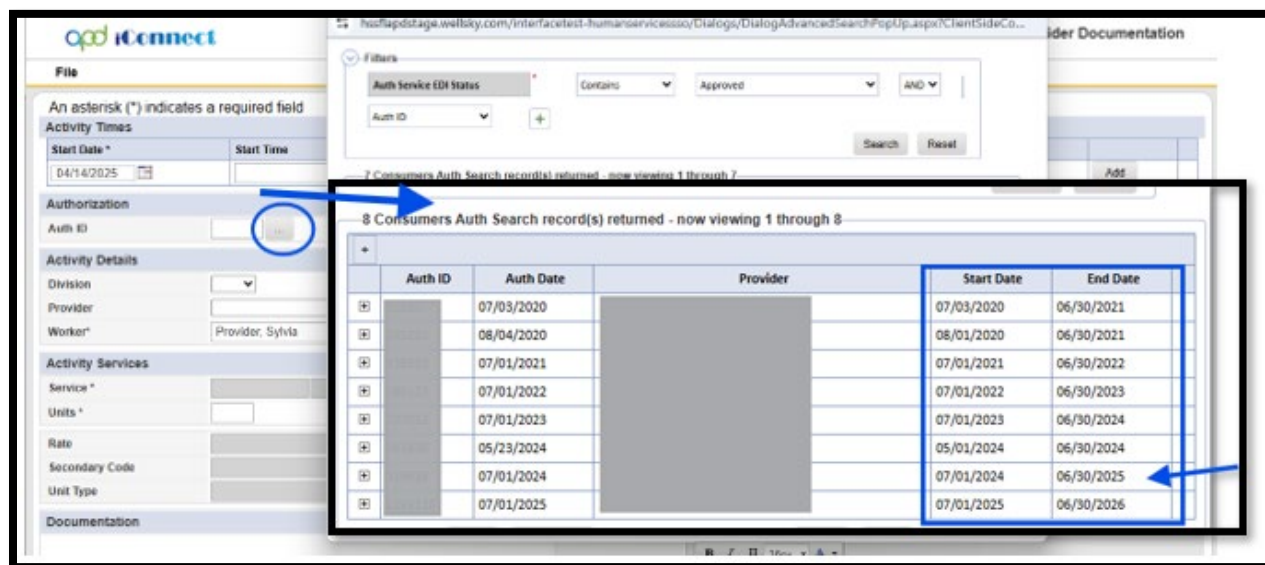


iConnect

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

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

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



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		07/01/2022	06/30/2023			
	Auth Service ID	Service Code	Service	Start Date	End Date	Max Units	Auth Service EDI Status	Max Amount
	80389	S5130:UC	(4140) Personal Supports	07/01/2022	06/30/2023	3492	Approved	\$19,101.24
	80388	S5135:UC	(4080) Life Skills Development - Level 1 (Community Inclusion)	07/01/2022	06/30/2023	4764	Approved	\$24,153.48
[-]	7	07/01/2023		07/01/2023	06/30/2024			
	Auth Service ID	Service Code	Service	Start Date	End Date	Max Units	Auth Service EDI Status	Max Amount
	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
[+]	612000	05/23/2024		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	Shelkh	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

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 practice	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

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.

Provider - 19452 (19452)

MY DASHBOARD | CONSUMERS | **PROVIDERS**

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.

Provider - 19452 (19452)

MY DASHBOARD CONSUMERS PROVIDERS

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

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.

File

8/14/2024 9:34 AM

Filters
Status Equal To New AND
iConnect ID +
Apply Alert Days Before Due
Search Reset

73 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
Davidson, Alexander	27102	Terminated Terminate Profile	04/19/2024	04/19/2024		New	Provider: Region
Davidson, Alexander	27102	Terminated Terminate Profile	04/19/2024	04/19/2024		New	Provider: Region
Davidson, Alexander	27102	Terminated Terminate Profile	04/19/2024	04/19/2024		New	Provider: Region
More, Henry	19101	The status of the authorization has changed.	05/09/2024	05/09/2024		New	Provider: Region
More, Henry	19101	The status of the authorization has changed.	05/09/2024	05/09/2024		New	Provider: Region
More, Henry	19101	The status of the authorization has changed.	05/09/2024	05/09/2024		New	Provider: Region
More, Henry	19101	The status of the authorization has changed.	05/09/2024	05/09/2024		New	Provider: Region
More, Henry	19101	The status of the authorization has changed.	05/09/2024	05/09/2024		New	Provider: Region
More, Henry	19101	The status of the authorization has changed.	05/09/2024	05/09/2024		New	Provider: Region
More, Henry	19101	The status of the authorization has changed.	05/09/2024	05/09/2024		New	Provider: Region
More, Henry	19101	The status of the authorization has changed.	05/09/2024	05/09/2024		New	Provider: Region
More, Henry	19101	The status of the authorization has changed.	05/09/2024	05/09/2024		New	Provider: Region
More, Henry	19101	The status of the authorization has changed.	05/09/2024	05/09/2024		New	Provider: Region
More, Henry	19101	The status of the authorization has changed.	05/09/2024	05/09/2024		New	Provider: Region
More, Henry	19101	The status of the authorization has changed.	05/09/2024	05/09/2024		New	Provider: Region

hssflapdstage.wellsky.com says

The status of the 'T4526:UC' authorization has changed. Case Number '2000011', Auth Service ID '721196' and AuthService EDI Status is now 'Terminated'

OK

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.

Auth ID	Auth Date	Provider	Start Date	End Date
256837	07/13/2022	Provider - 19176	07/01/2022	06/30/2023
257482	03/14/2023	Provider - 19176	07/01/2022	06/30/2023
258803	07/16/2024	Provider - 19176	07/01/2024	06/30/2025
310026	06/23/2025	Provider - 19176	07/01/2025	06/30/2026

Auth Service ID	Service Code	Service	Start Date	End Date	Max Units	Auth Service EDI Status	Max Amount
212734	97535:UC	(4290) Supported Living Coaching	07/01/2025	06/30/2026	209	Ready to Send	\$1,586.31
212739	A4335:UC	(4437) Incontinence Supply; Miscellaneous	07/01/2025	06/30/2026	12	Ready to Send	\$120.00
212737	S5102:UC	(4082) Life Skills Development - Level 3 (ADT) - Facility Based	07/01/2025	06/30/2026	1566	Ready to Send	\$9,458.64
212735	S5130:UC	(4140) Personal Supports	07/01/2025	06/30/2026	1044	Ready to Send	\$5,710.68
212736	S5135:UC	(4080) Life Skills Development - Level 1 (Community Inclusion)	07/01/2025	06/30/2026	1044	Ready to Send	\$5,293.08
212738	T2003:UC	(4320) Transportation - Trip	07/01/2025	06/30/2026	522	Ready to Send	\$2,610.00

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.

Activity Details

Division: APD

Provider: Provider - 19176

Worker*: Buffington, Christine

Status: Pending

Associated Service: Personal Supports

Documentation Type: Service Log

Activity Services

Service *: S5130:UC (4140) Personal Supports

Units *: 28

Rate: \$5.47

Secondary Code: S5130:UC

Unit Type: 15 mins

Documentation Type dropdown options: Annual Report, Daily Attendance Logs, Monthly Summary, Progress Note, Quarterly Summary, Service Log, Trip Log

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

Activity Details	
Division	APD
Provider	Provider - 19176 Details
Worker*	Buffington, Christine Lookup Clear Details
Status	Pending
Associated Service	Personal Supports
Documentation Type	Service Log
Activity Services	
Service *	S5130:UC (4140) Personal Supports Clear
Units *	16
Rate	\$5.07
Secondary Code	S5130:UC
Unit Type	15 mins
Documentation	
Provider Documentation Type * Annual Report Daily Attendance Log Monthly R&B Monthly Summary Progress Note Quarterly Summary	Service Log Note

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

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

The services code does not match Personal Supports.

Authorization	
Auth ID	PA Number
Activity Details	
Division	APD
Provider	Details
Worker*	Details
Status	Complete
Entered Via EVV	
Activity Services	
Service *	S5130 UC SC (4141) Personal Supports - Day
Units *	20
Rate	\$5.63
Secondary Code	S5135 UC
Unit Type	15 mins
Total Cost	\$112.60
Documentation	
EVV Violation(s)? ☐ Unresolved EVV Violation(s)? ☐ Associated Service Life Skills Development 1 Documentation Type Service Log	

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

Activity ID	Date	Worker	Provider	Service Code	Units	Status	Associated Service	Documentation Type
	05/06/2025			S5135 UC	20.00	Complete	Life Skills Development 1	Service Log

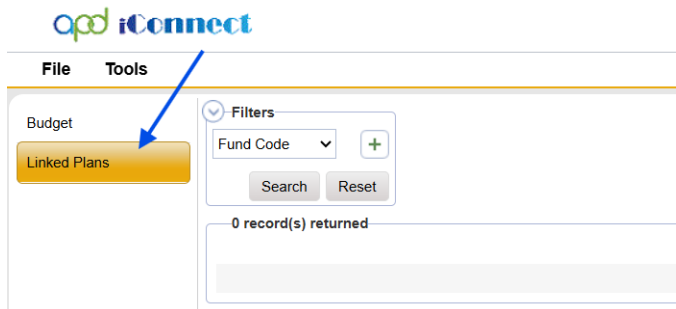
First Previous Records per page 15 Next Last

v8.8.1.5 [About](#)

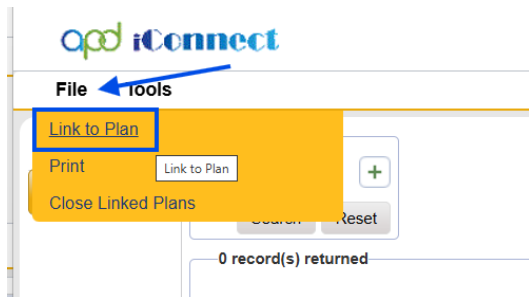
Opening Plans from the Consumer Budgets tab – WSC Edition

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

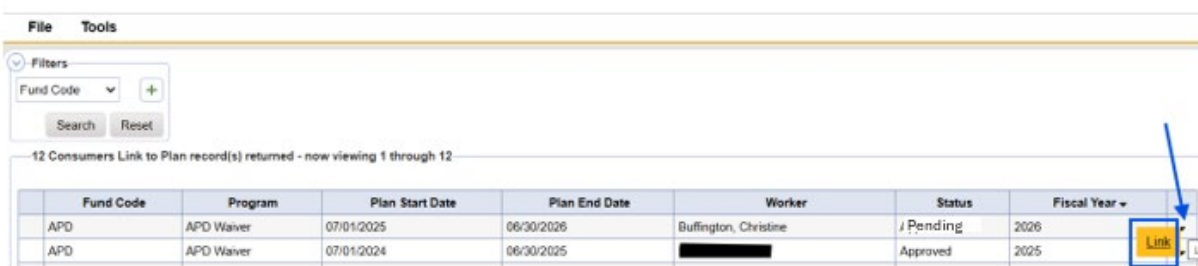
1. The WSC is in the Consumer Budgets tab and the Linked Plan bookmark.



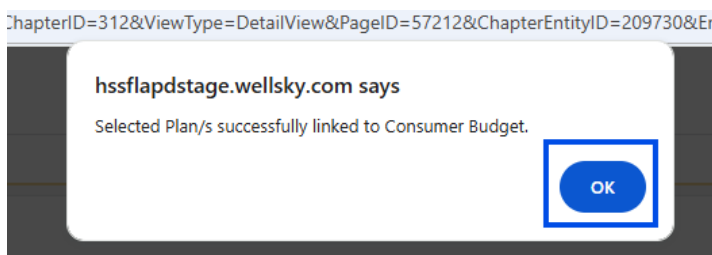
2. Navigate to **File** and select **Link to Plan**.



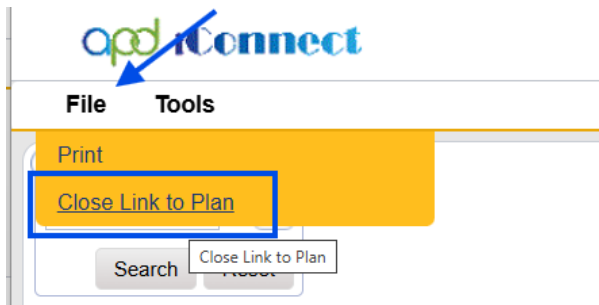
3. Navigate to the appropriate plan from the list view grid and utilize the caret click **Link**.



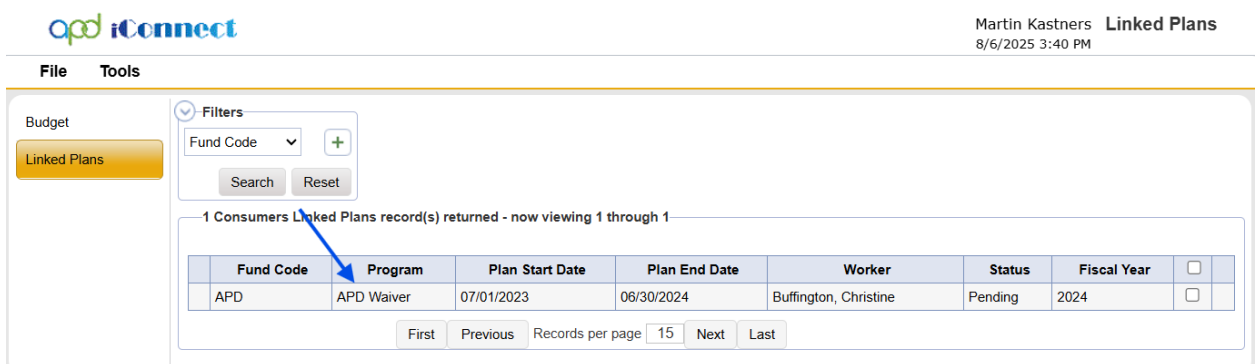
4. Press **OK** to acknowledge that the Plan was linked.



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.

The screenshot shows the 'Plan Information' form in the APD iConnect system. The form includes a sidebar with 'Plan Information', 'Planned Services', and 'Cost Plan Review Notes'. The main form area contains fields for Plan Details, including Division, Program, Worker, Cost Plan Creation Date, Comments, Review Request Date, Status, Cost Plan Begin Date, Cost Plan End Date, APD is in receipt of the Certification of Available Services Form, Date of VAS Reviewed, Region or State Review, and Fiscal Year. A blue arrow points to the 'Program' field, which contains the text 'APD Waiver'.

An asterisk (*) indicates a required field

Plan Details

Division * APD

Program * APD Waiver [Details](#)

Worker Buffington, Christine [Lookup](#) [Clear](#) [Details](#)

Cost Plan Creation Date * 06/29/2023

Comments

Review Request Date * 07/01/2023

Status * Pending

Cost Plan Begin Date * 07/01/2023

Cost Plan End Date * 06/30/2024

APD is in receipt of the Certification of Available Services Form Yes

Date of VAS Reviewed 06/29/2023

Region or State Review * Central

Fiscal Year * 2024

October 1, 2025

Reviewing Provider Documentation

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

The Service Provider Documentation Report contains the following information:

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

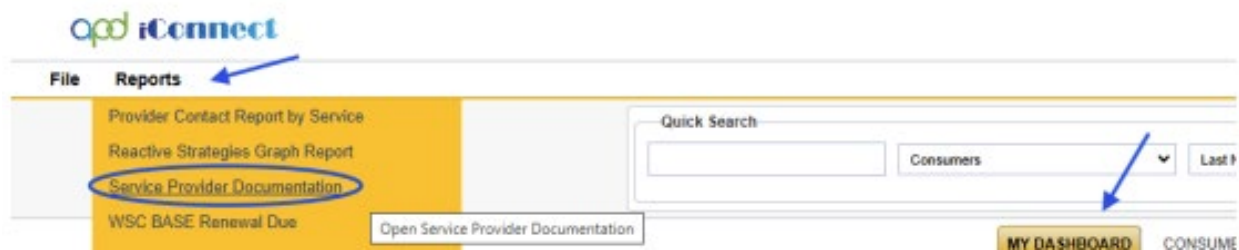
- Region of the consumer
- Consumer's iConnect ID
- Consumer's name
- Primary Worker's name (the name of the Waiver Support Coordinator (WSC))
- WSC QO's name (the Qualified Organization that employs the WSC)
- PA Number
- Service Code
- Service Name
- Activity Time Entries (number of entries for that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

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



The screenshot shows the top navigation bar of the iConnect dashboard. On the left, there is a 'My Dashboard' link and a 'Sign Out' link. To the right, there is a 'Role' dropdown menu. The dropdown menu is open, showing 'Service Provider' as the selected option. A blue arrow points to the 'GO' button, which is highlighted with a blue circle.

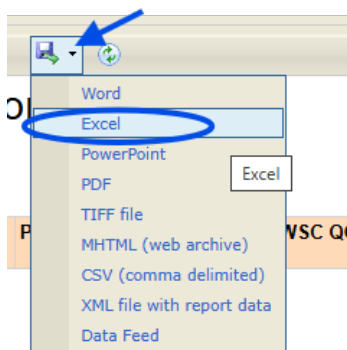
2. On My Dashboard, navigate to the **Reports** menu and select Service Provider Documentation.



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.

A screenshot of the search screen for the Service Provider Documentation report. The screen has a light beige background. At the top left, there is a 'HTML' label and an 'Export' button. Below this are several search criteria fields: 'Begin Date:' with a date picker, 'End Date Before:' with a date picker, 'Provider Name:' with a dropdown menu showing '<Select a Value>', 'Worker Name:' with a dropdown menu, 'iConnect ID:' with a text input field and a checked 'NULL' checkbox, and 'Service Name:' with a dropdown menu. On the right side of the screen, there is a button labeled 'View Report' which is circled in blue.

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.