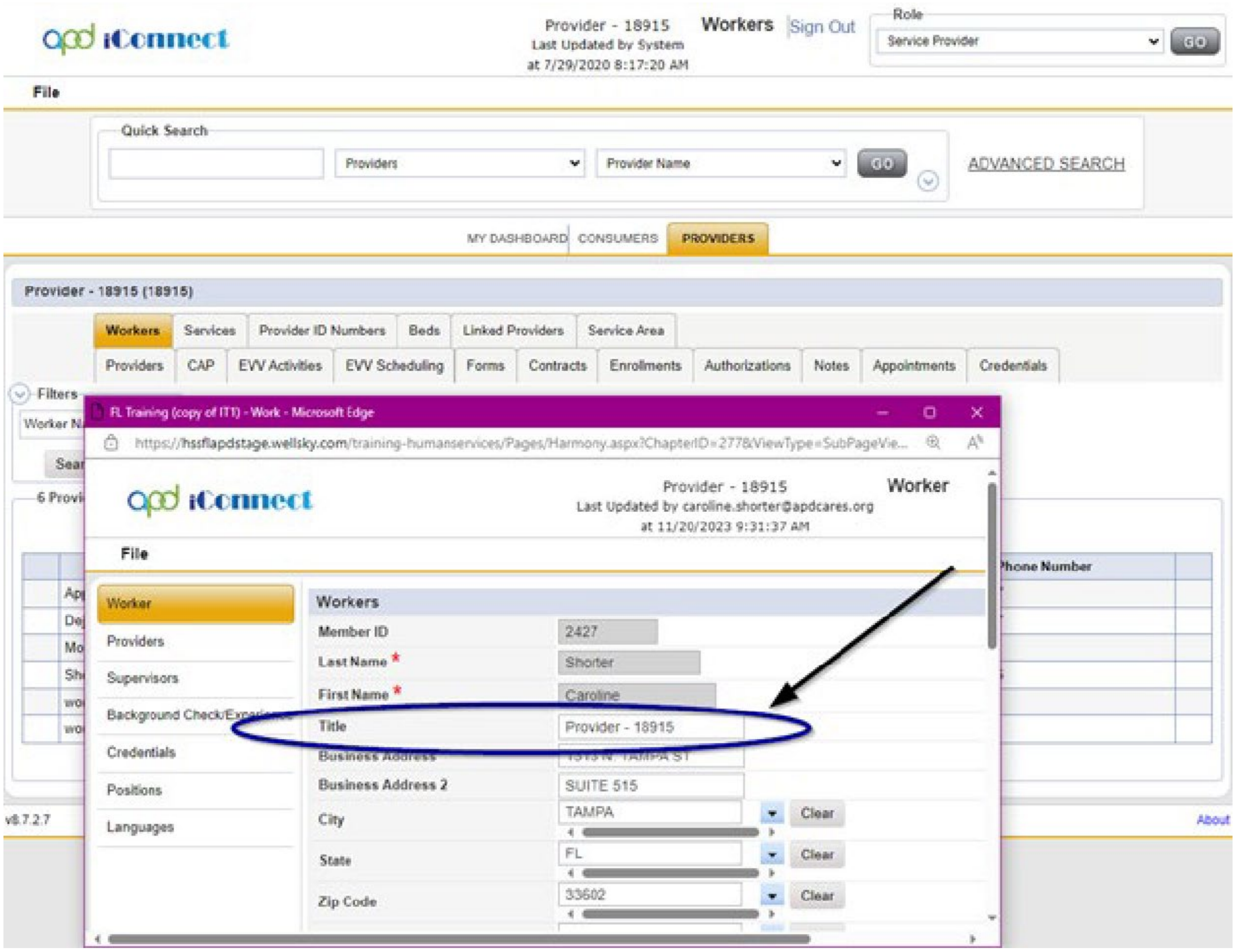
May 1, 2024

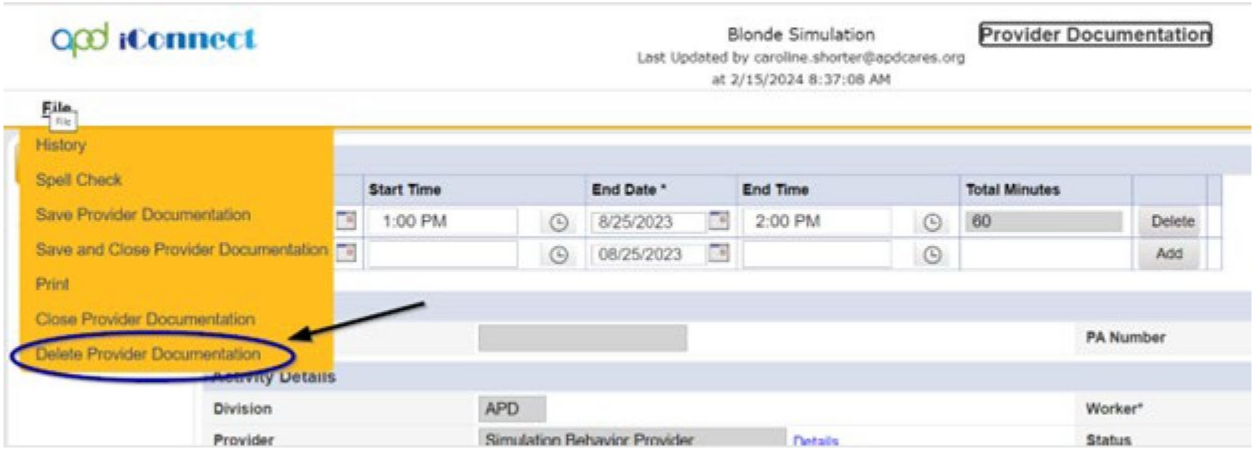
Identifying Multiple Workers with the Same Name

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.

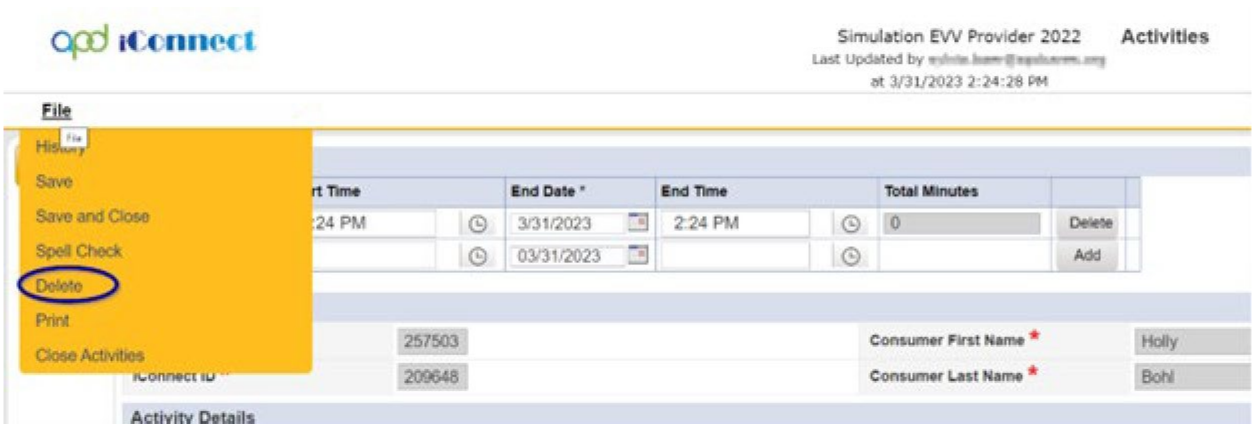


Missing EVV Activities/Provider Documentation Activities

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.

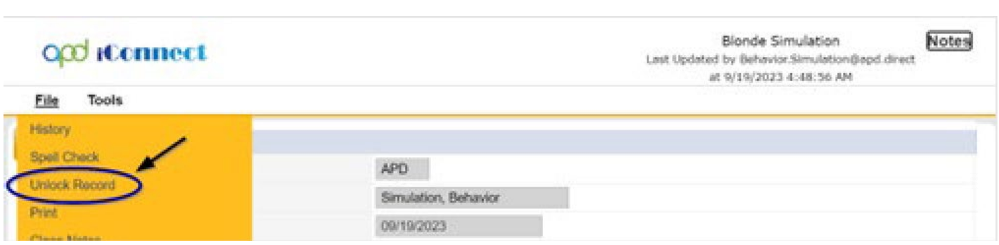


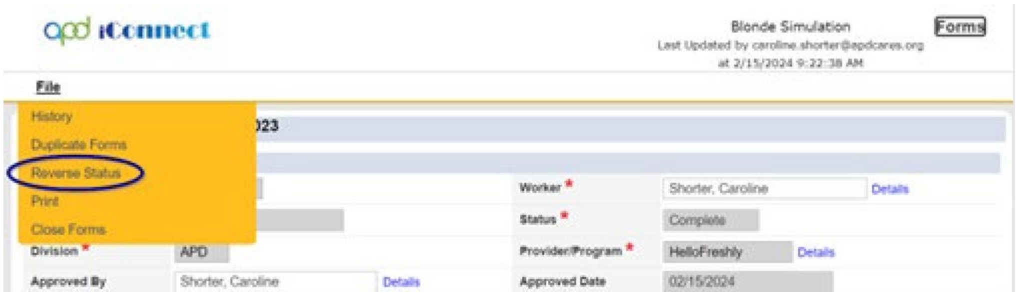
Have you identified missing EVV Activities? The Provider EVV Manager Role has the necessary permissions to delete existing EVV records. As an agency owner, if you feel that these permissions are unnecessary for your staff, manage their user accounts and remove the Provider EVV Manager role from their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

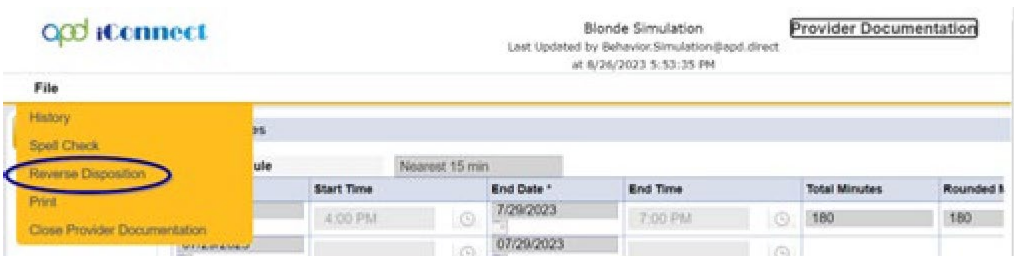


Need to Update a Record in Complete Status?

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.

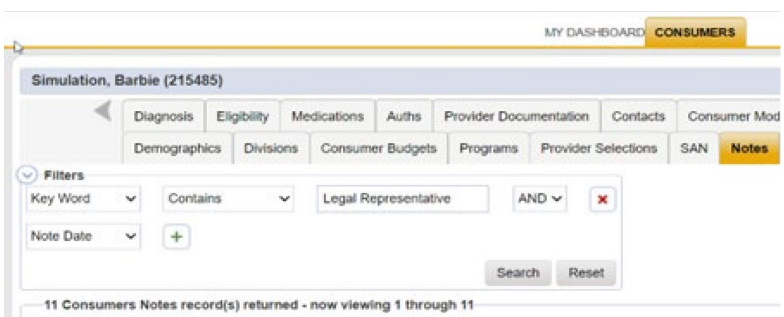


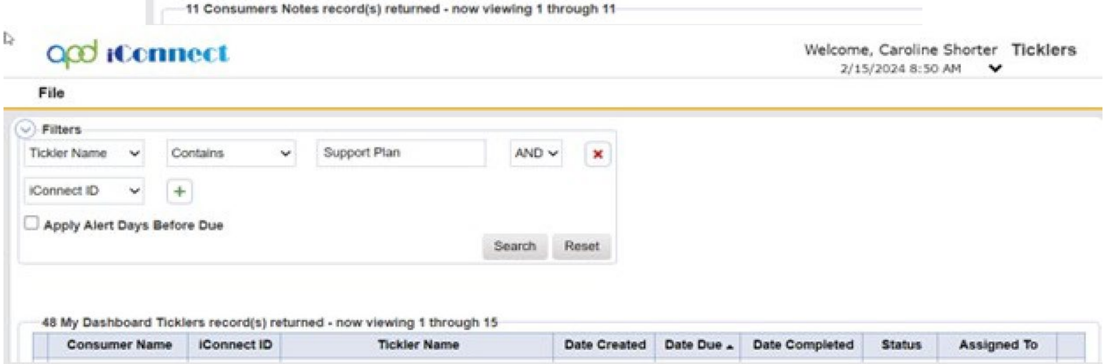




Using Filters

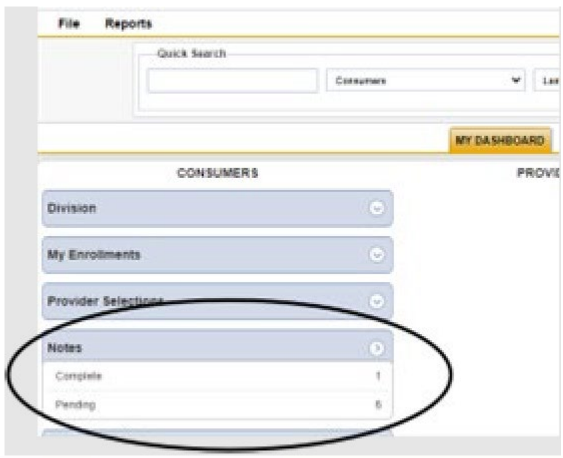
Have you been using iConnect for some time and are having challenges in locating specific records? Use the Filter Options available within most tabs/pages in iConnect. If performing a word search, update the criteria to “Contains” and type the word that is being searched…. Or type the first three letters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

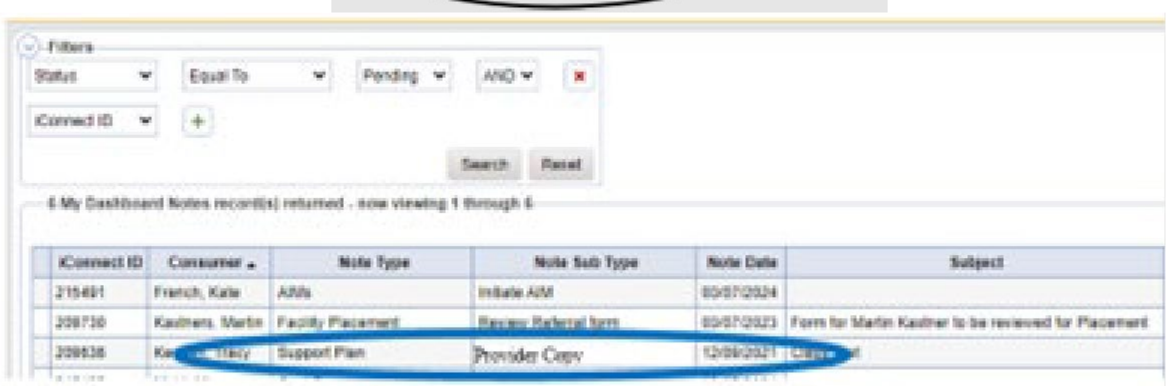


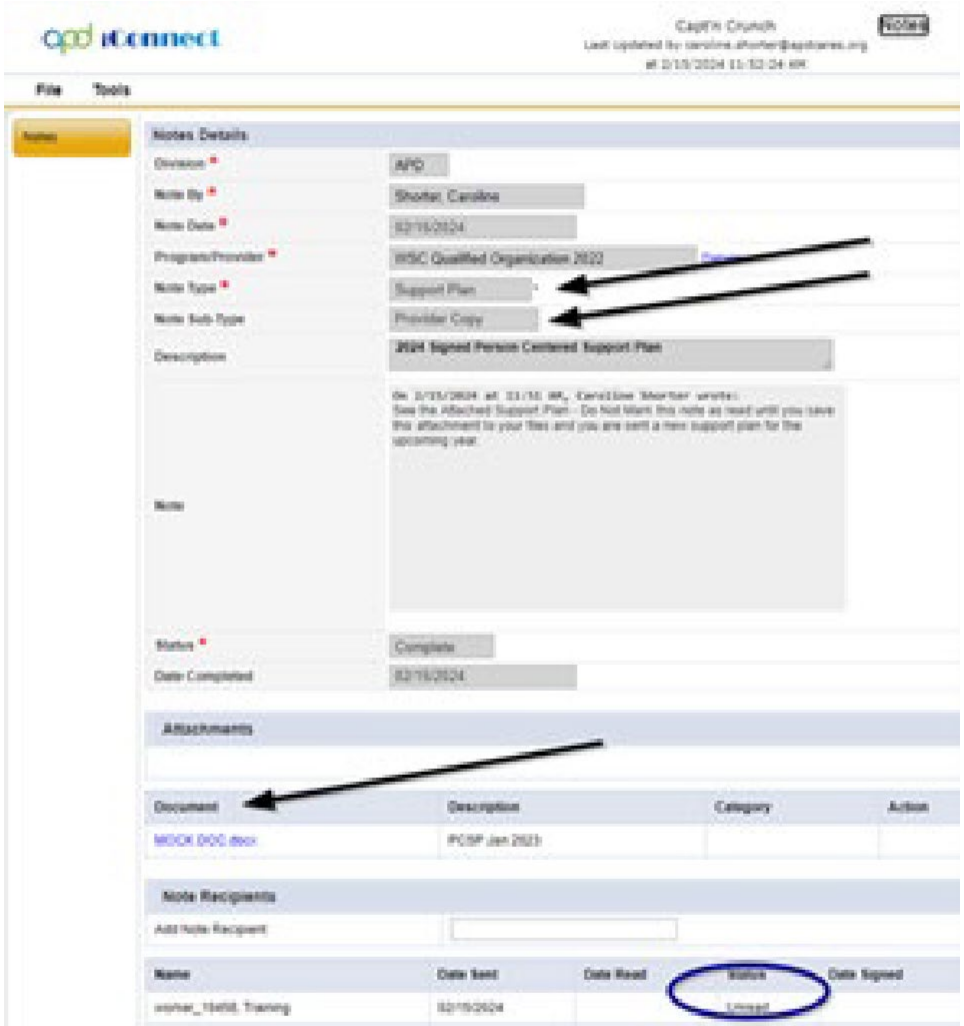


Identifying where the Support Plan is from the Waiver Support Coordinator (WSC)

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.

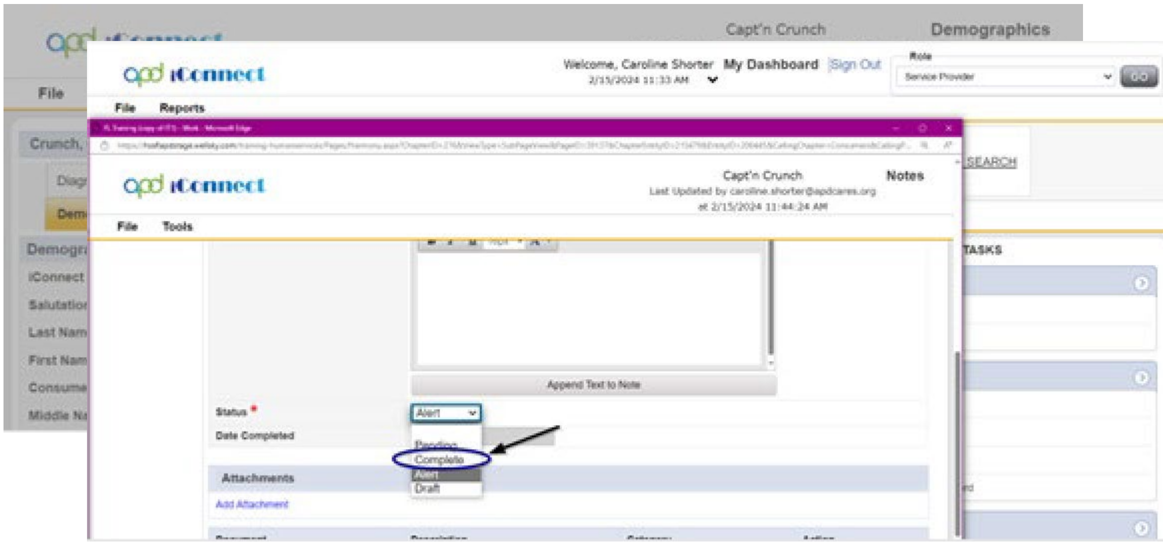






Why Do Alert Notes Appear When a Consumer Record is Opened?

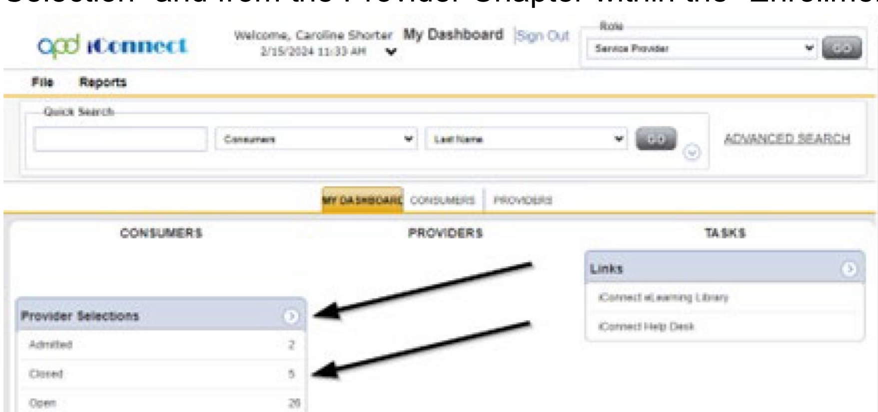
Do you see an Alert Note pop-up every time you open a consumer's record? Evaluate the Note to see if it is for a consumer death or change in WSC. If it is not for either of those cases, then the Note needs to be updated to "Complete" Status. This update be completed by all roles. If you are unsure if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

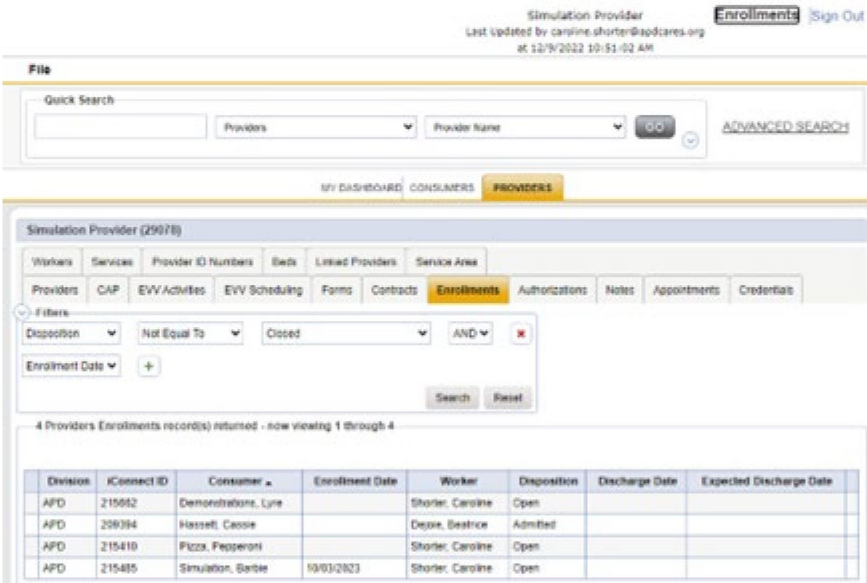


June 1, 2024

Need to Know There Is A Provider Selection for Your Organization

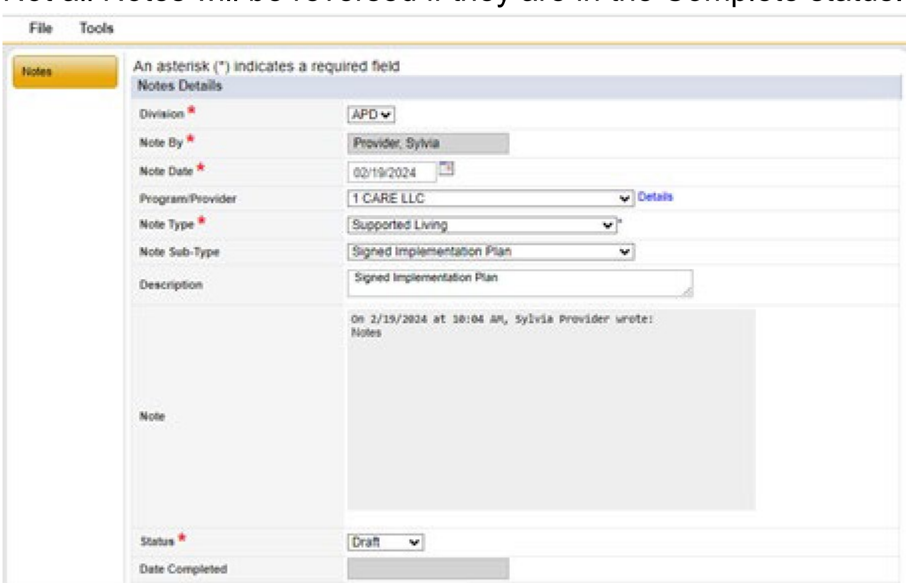
Have you contacted the Waiver Support Coordinator and are eagerly waiting for the provider selection record to be added to the consumer's record? Once the provider selection record is created, you will see the record from My Dashboard as a "Provider Selection" and from the Provider Chapter within the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

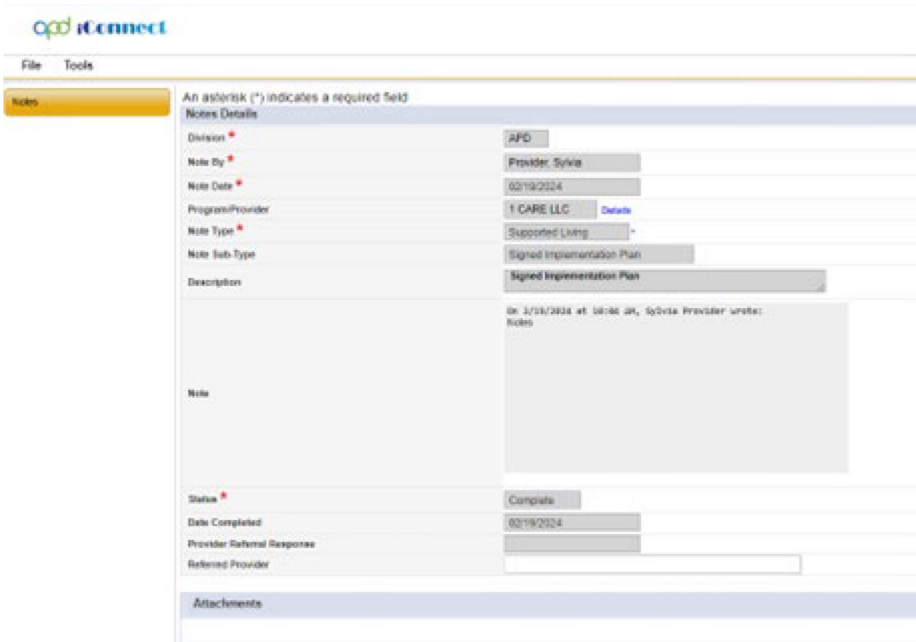




How Can I Change a Note in iConnect That Is Grayed Out?

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.





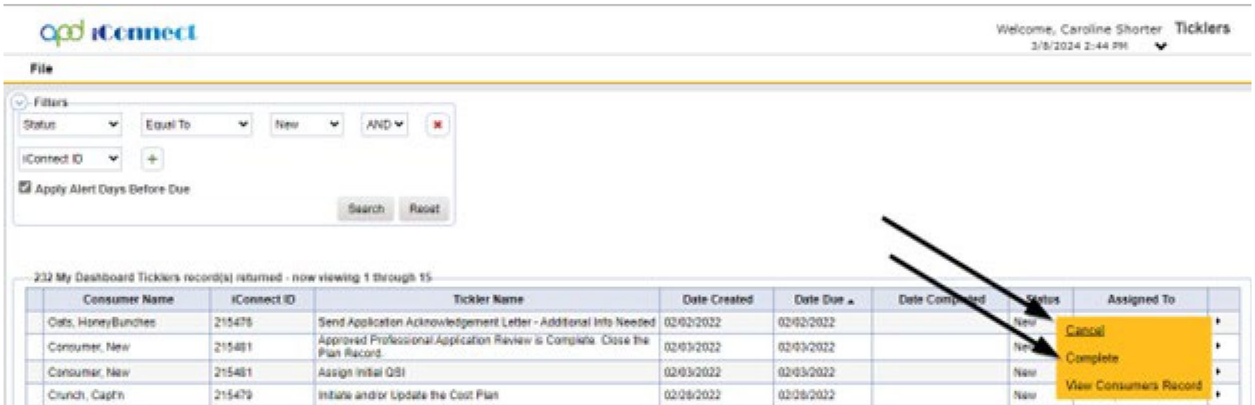
How To Know if Notes Have Been Read

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.



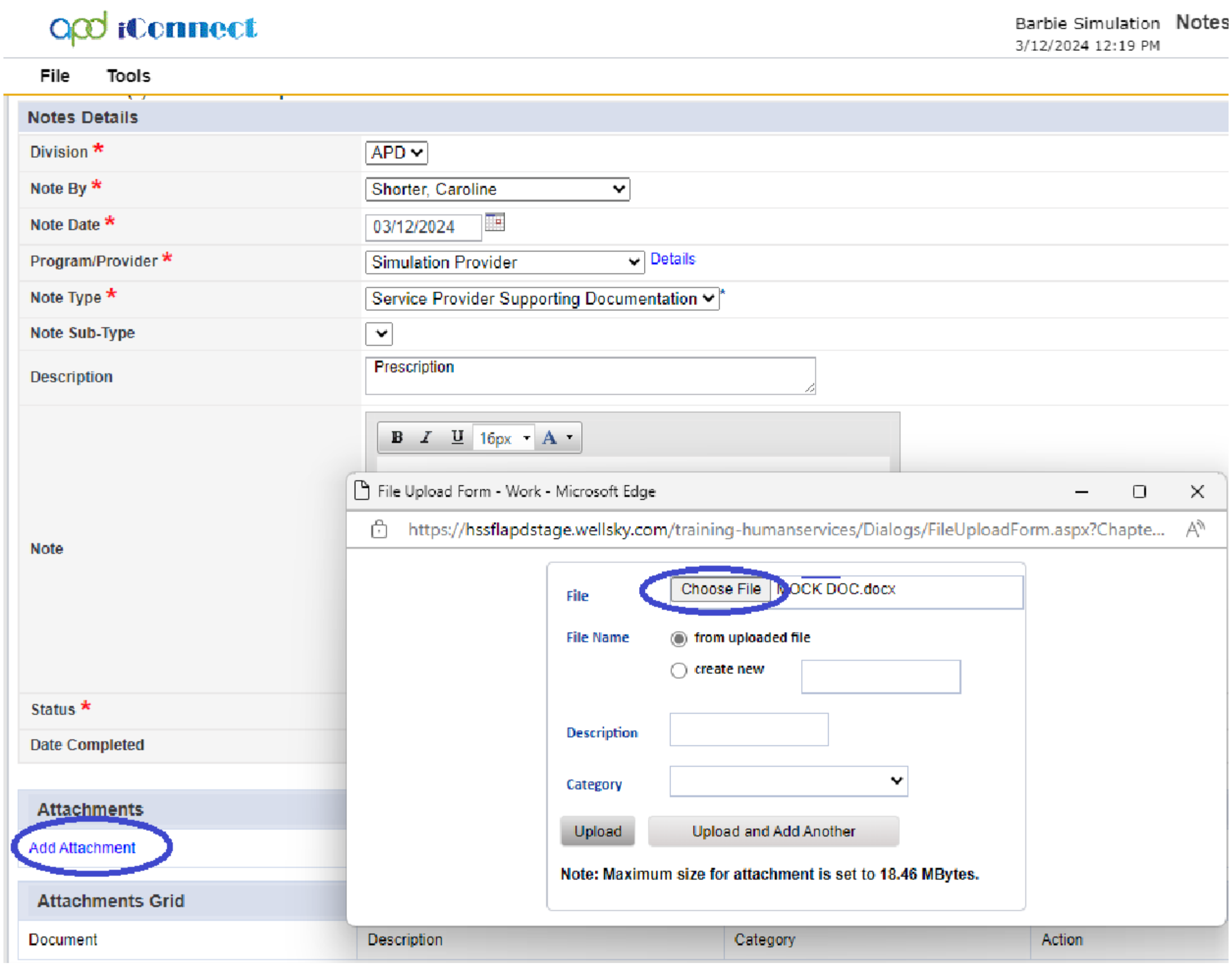
Need A Transcript of TRAIN Course Modules in Writing

If you want to review the “Script”, aka Transcript of the TRAIN FIlorida 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

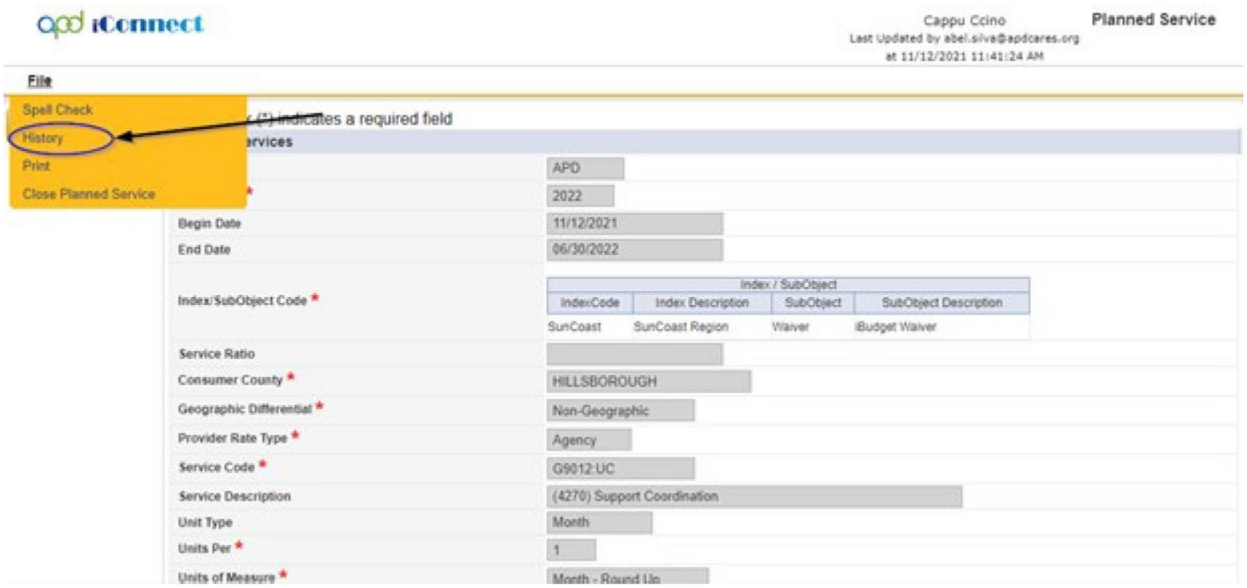
Do you have additional information that you need to include in the Consumer or Provider record? Use the Note tab in either record to add a new note. Complete the required fields in accordance to the workflow you are following. Use the Add Attachment link to open the File Upload Form window. Click “Choose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

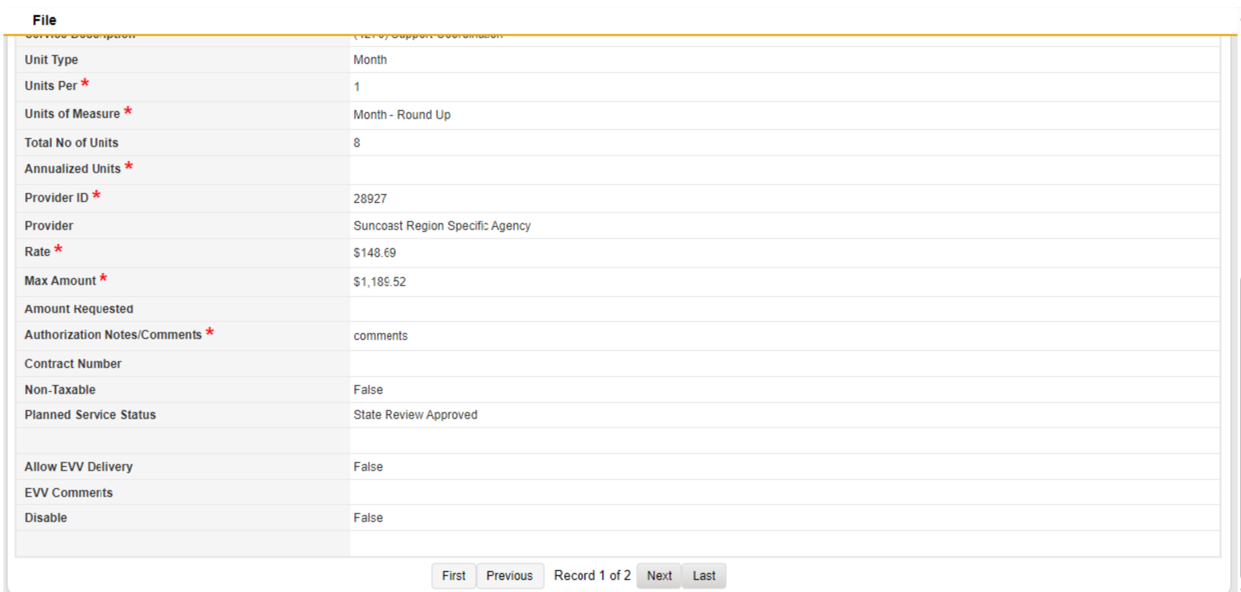


Viewing History in iConnect

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.

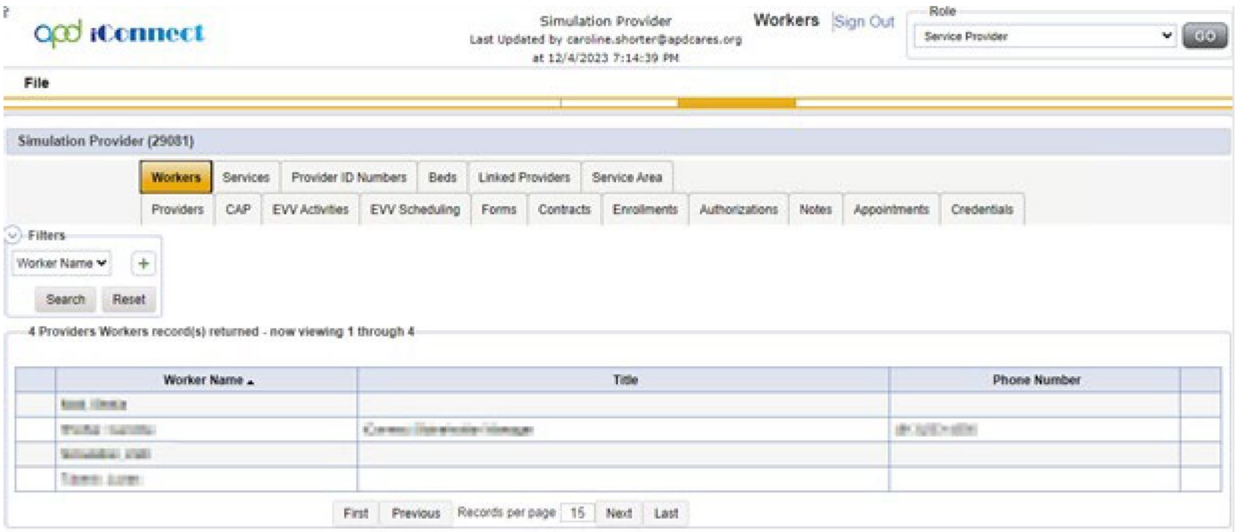
It is important to note that you will only see the toggle to view different pages in the history if the item has been saved more than once.

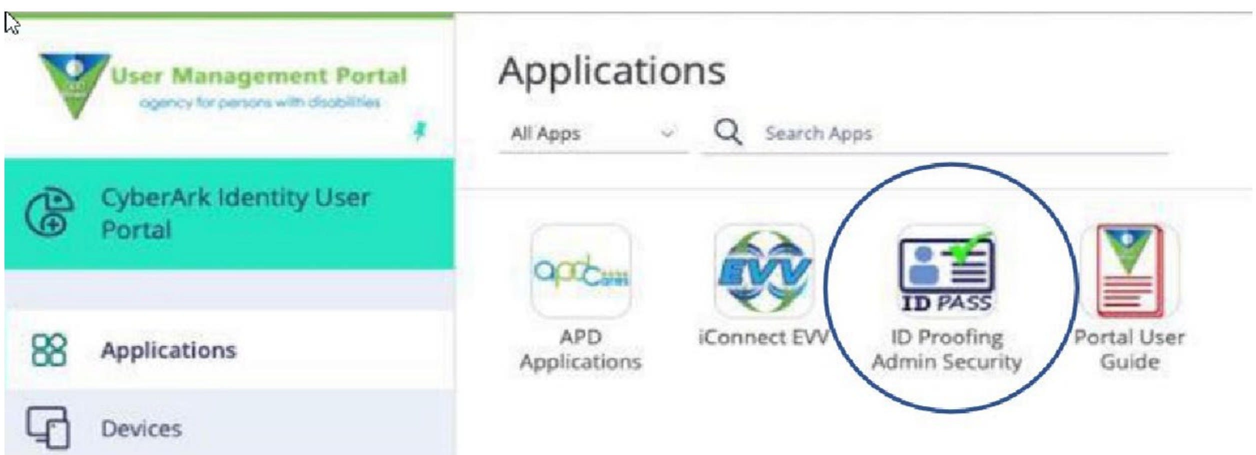




Unable to See Workers in iConnect

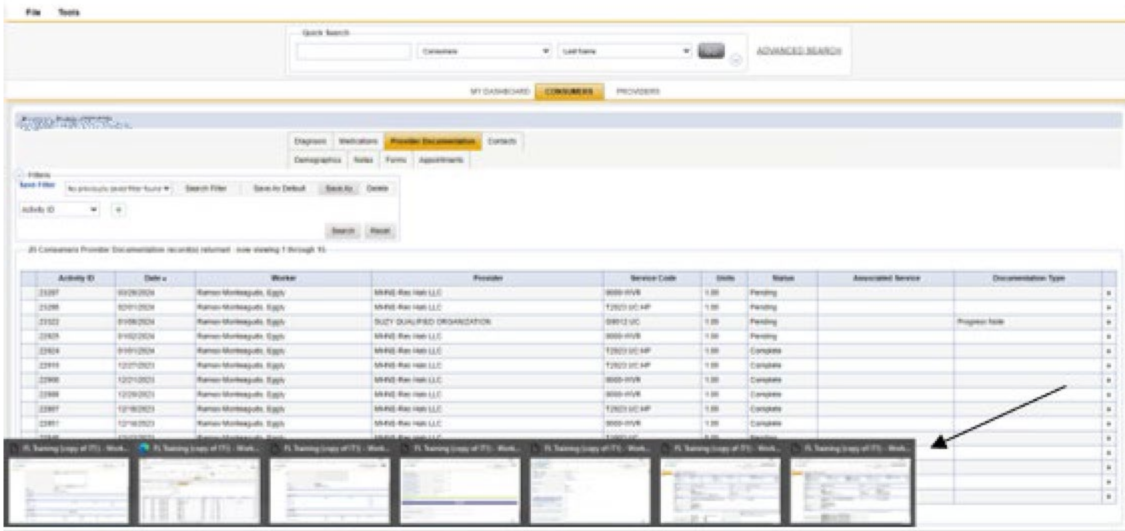
When reviewing the list of workers within my Provider Record, I'm not able to see an employee. The employee reports as having signed into iConnect. What is going on? It is likely that your employee has multiple employments and may be signing into an account created by another organization. You will need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

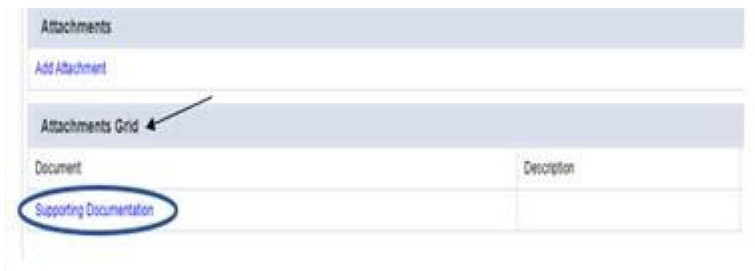


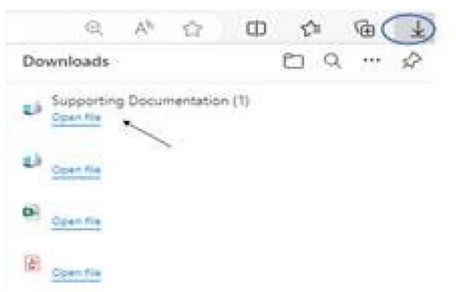


Time-Out Feature in iConnect

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.



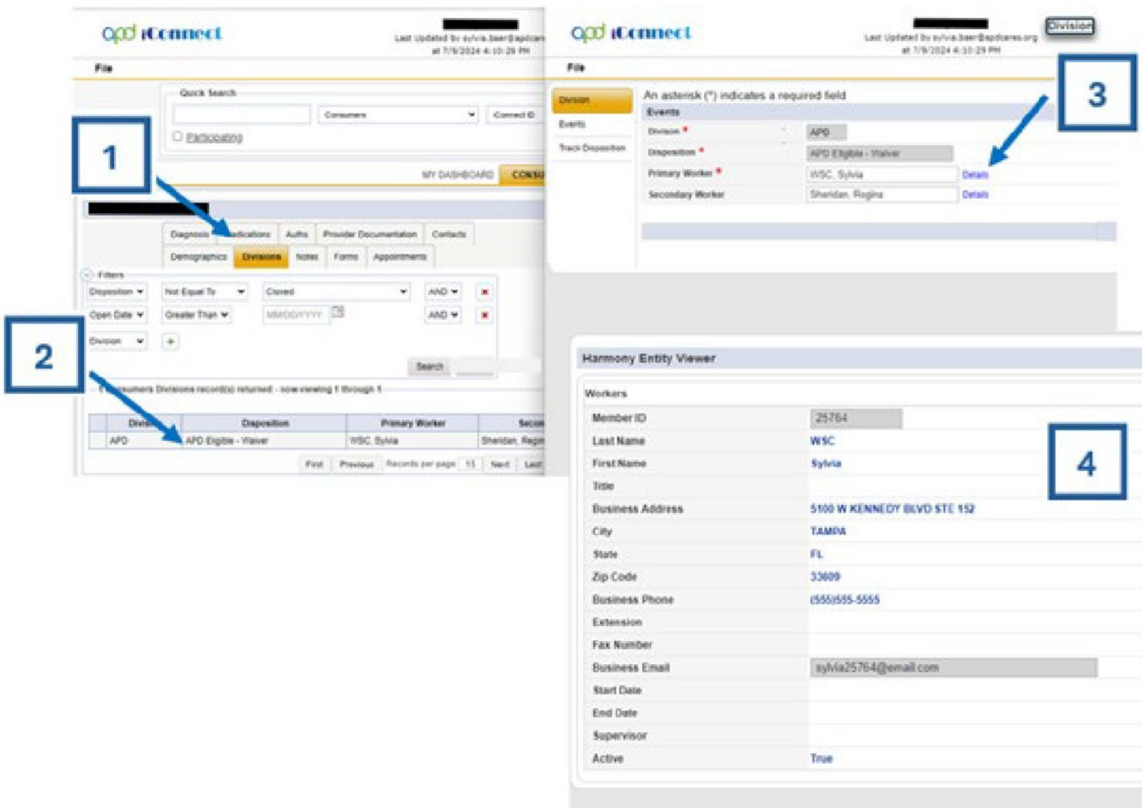




August 1, 2024

Division Tab – Locating WSC's Contact Information for Client

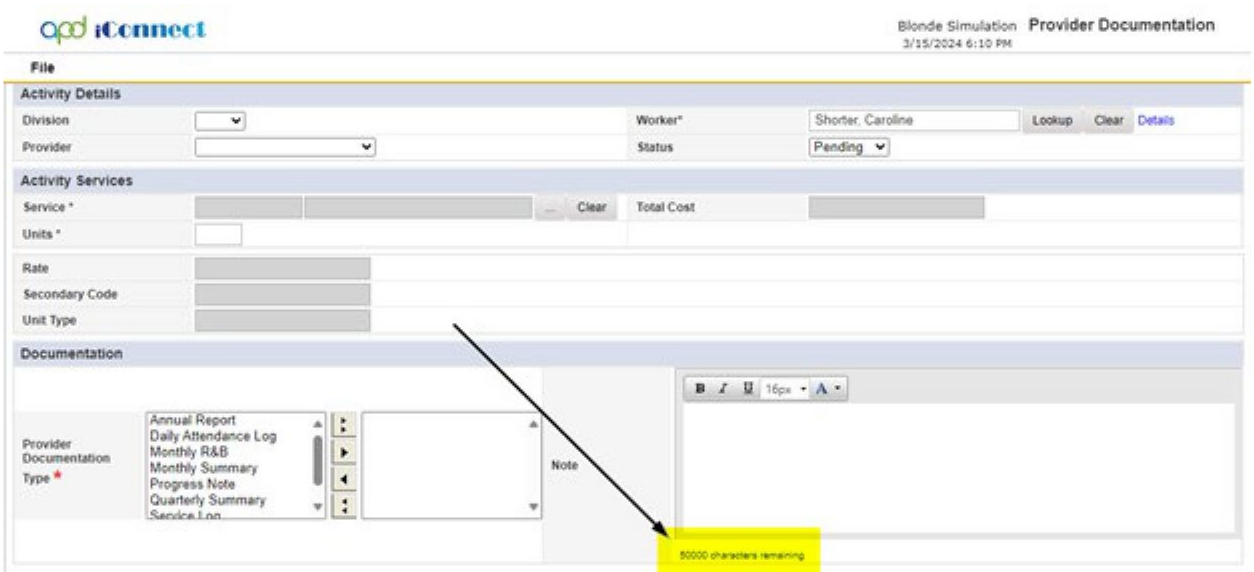
A new enhancement has been implemented in iConnect that now allows the Service Provider and Service Provider Worker roles to access the Division tab of the clients that they have authorizations for in iConnect. This will allow the Service Provider and the Service Provider Worker to find details of the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

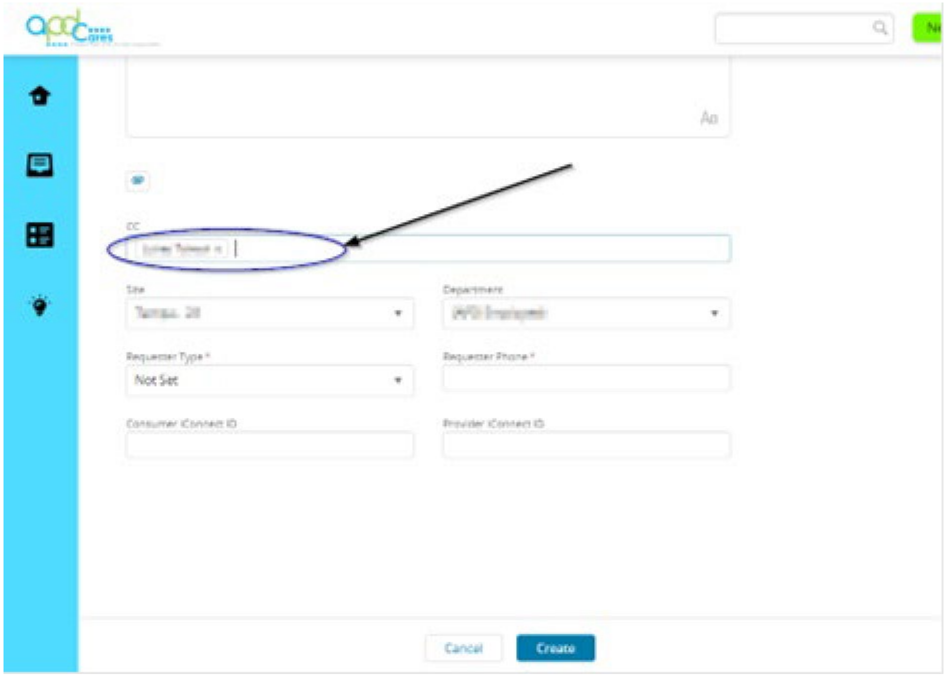
Is there a way to see the character limits within iConnect?

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.



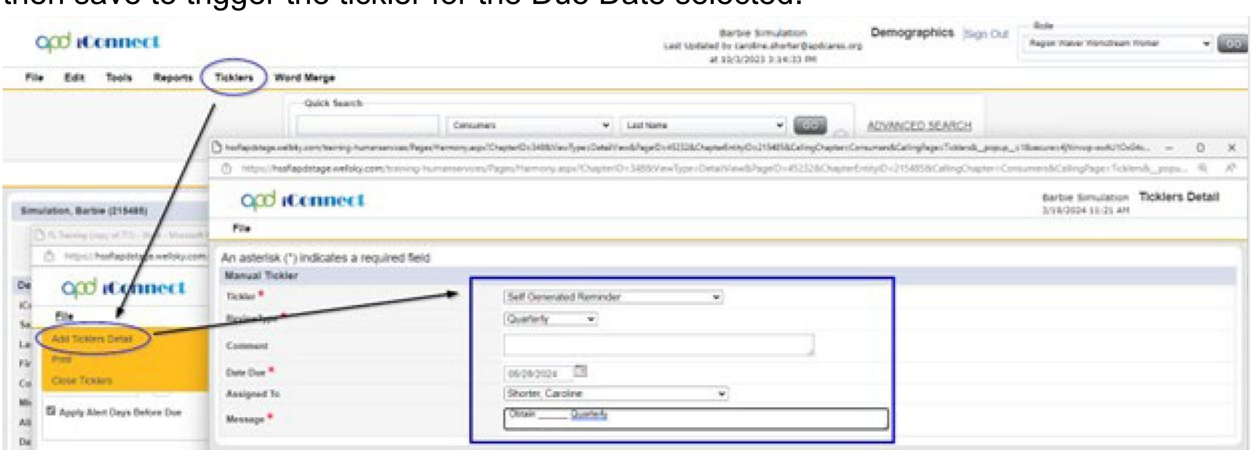
How do I access the Service Desk Ticket that my staff has submitted?

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.

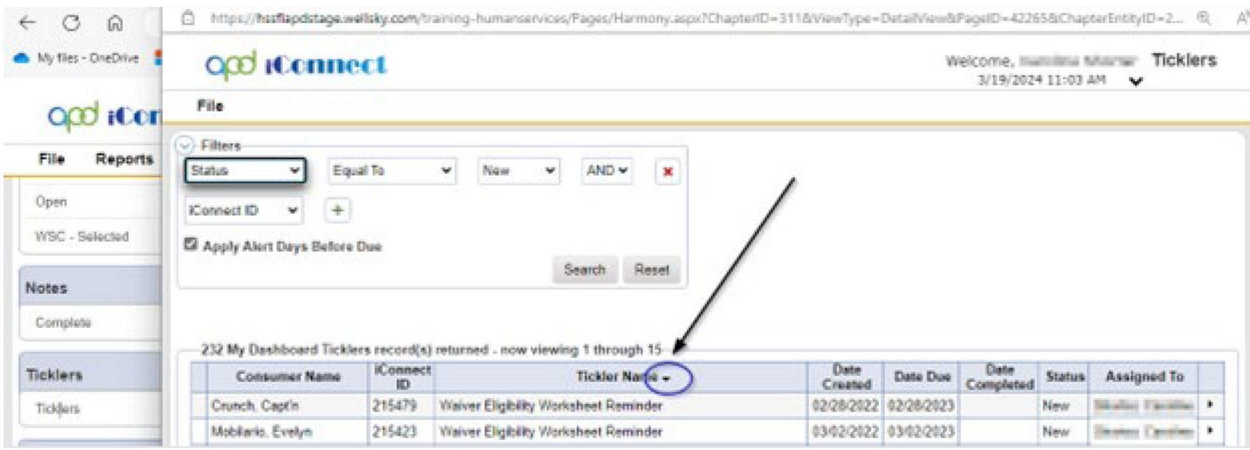


How do I sort through my Ticklers?

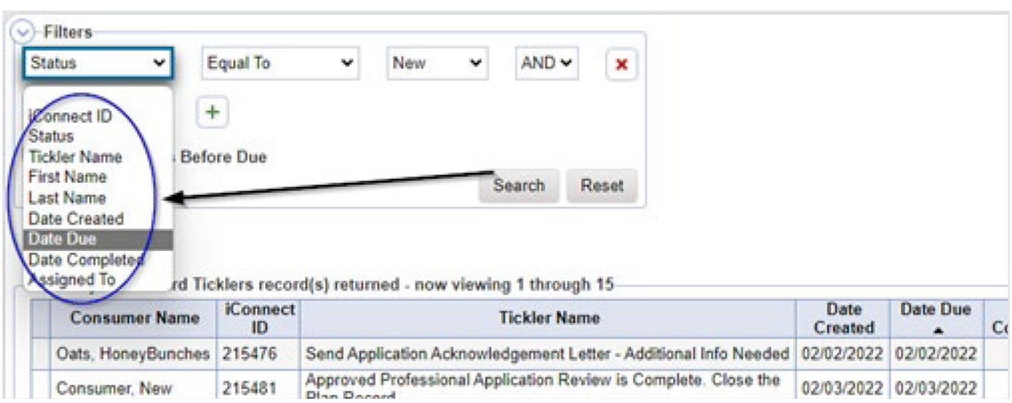
Have you allowed your tickler list view to grow and now are having a challenge in prioritization? Use the sort feature and the filters to locate and prioritize your list of ticklers. You can sort the list by clicking on one of the headings (Consumer Name, iConnect ID, Tickler Name, Date Created, Due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

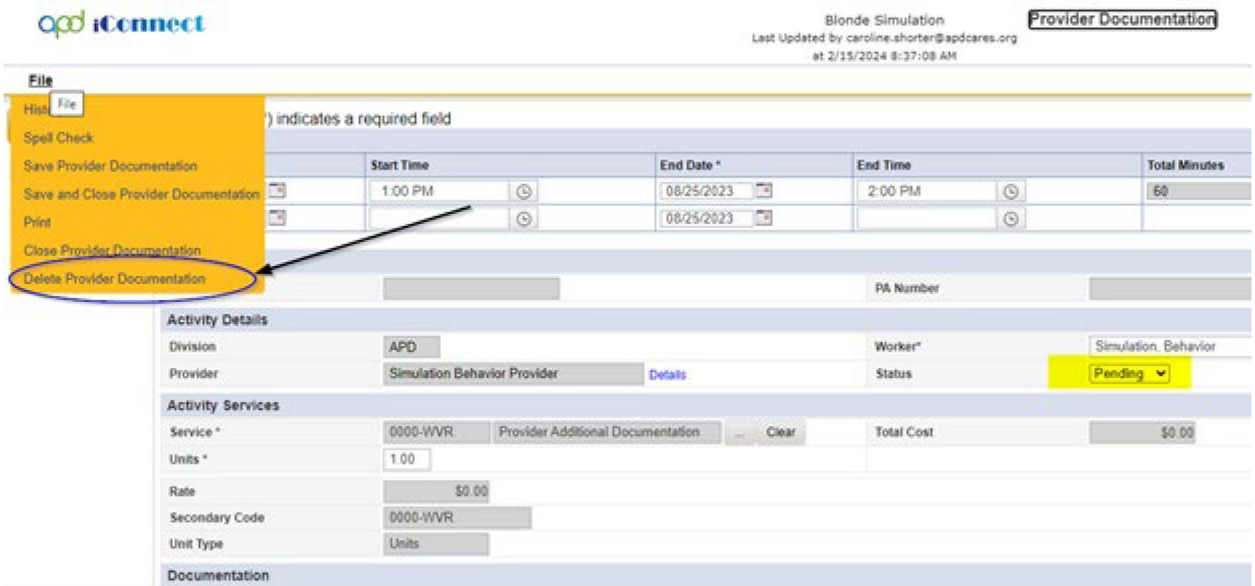


September 1, 2024

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.

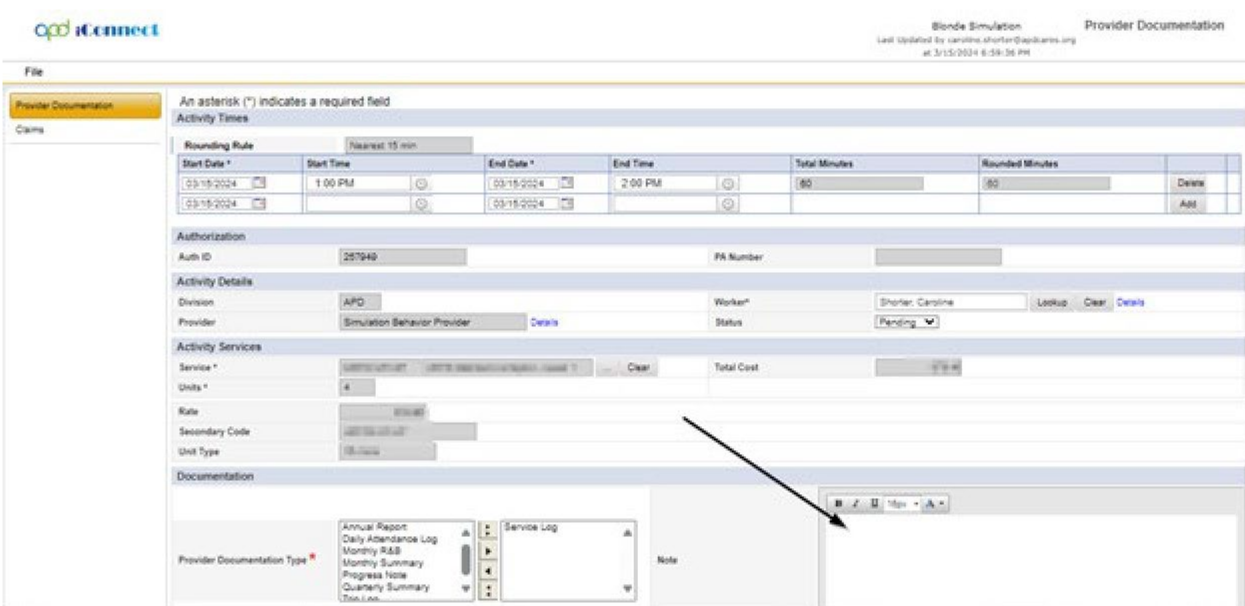


October 1, 2024

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.

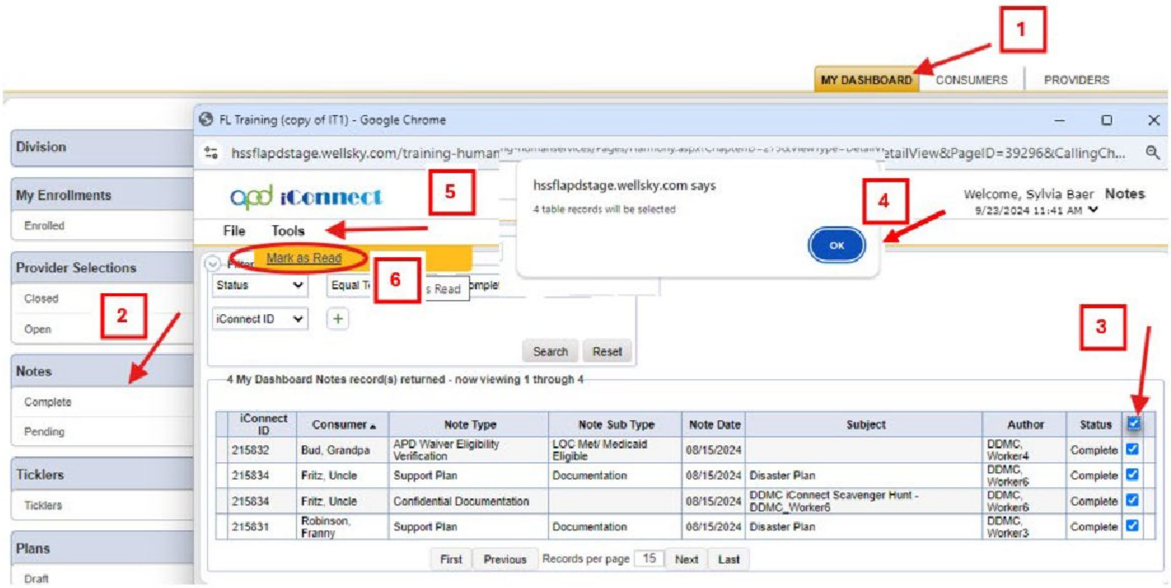


November 1, 2024

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

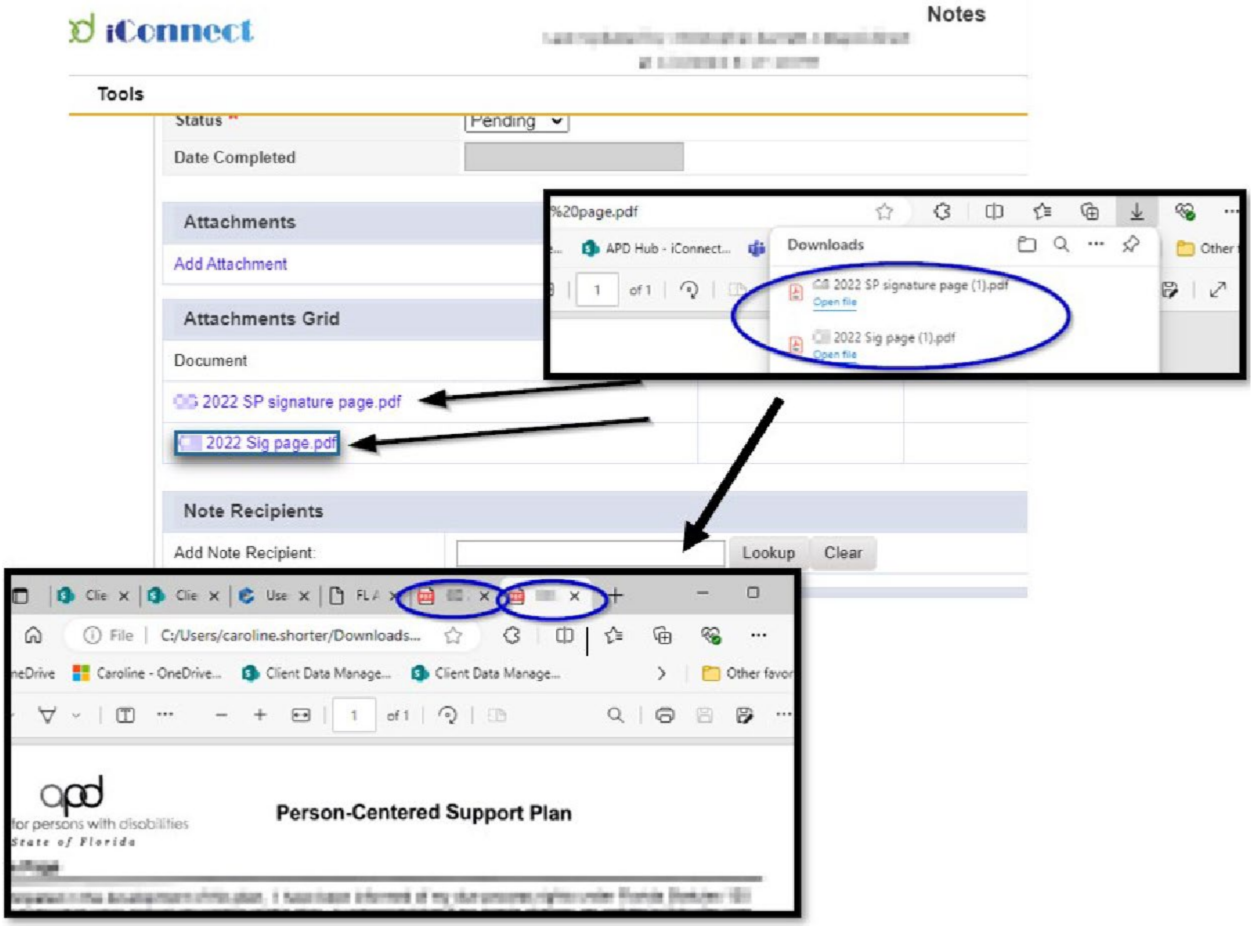


December 1, 2024

Opening Multiple Attachments That Are Within the Notes Tab

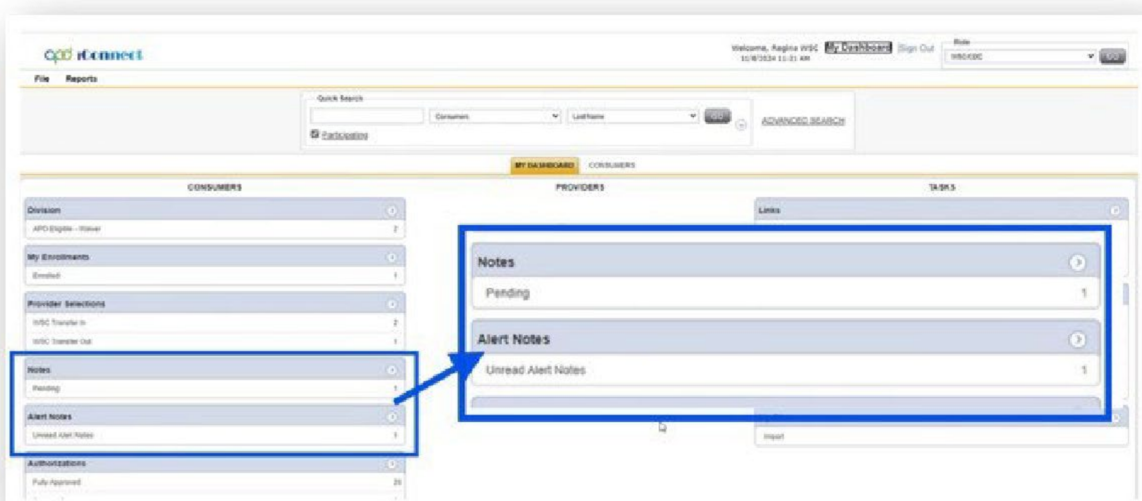
When there is a need to review all the attachments within one Note, are users required to open each attachment then close that attachment to then open another?

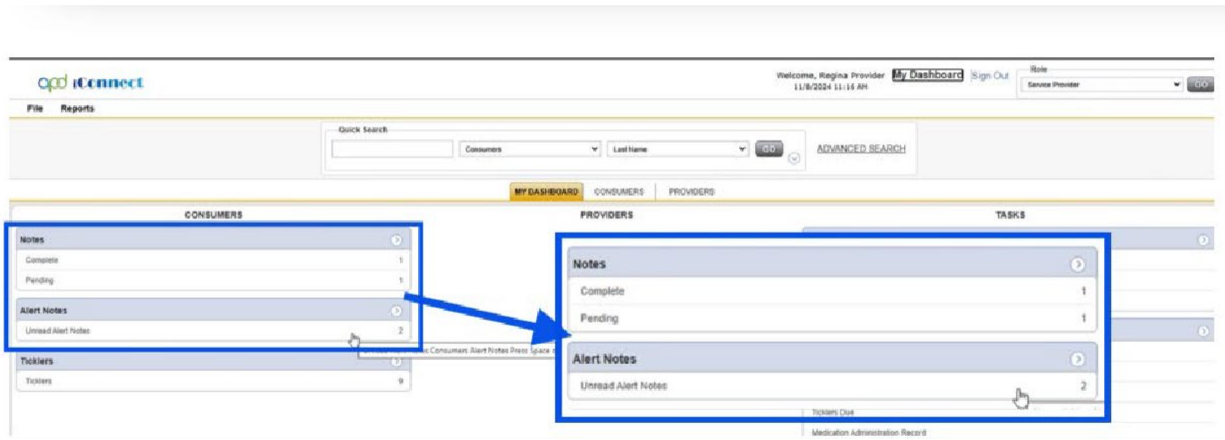
No, when the user clicks on one attachment, the file will download onto their device, so the user can open multiple files at one time by downloading all the files and opening them from the device. This allows for multiple documents to remain open at the same time until the user closes them.



Where do we find Alert Notes?

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

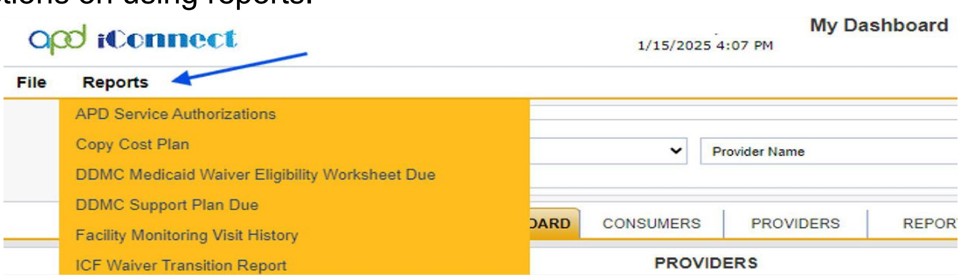




February 1, 2025

Where do I find reports in iConnect?

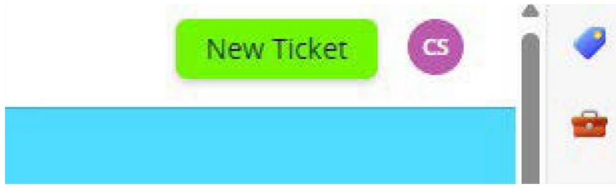
Reports are found in different screens within iConnect depending on their usage and workflow. Locate the Reports menu dropdown on the screen to see what reports are available for you to use. Remember to refer to the job aids available for detailed
instructions on using reports.



How do I create a service desk ticket through CyberArk?

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

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

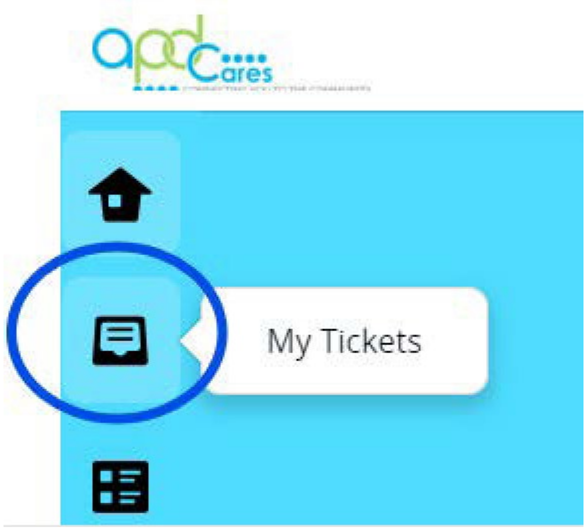


How do I access a service desk ticket already created?

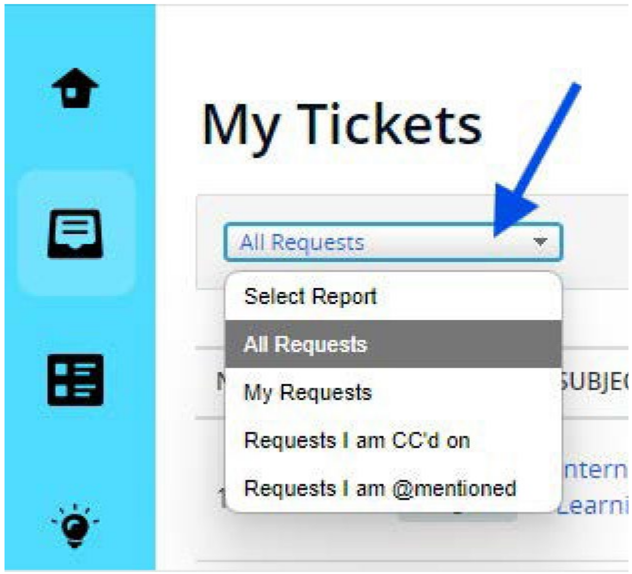
1. Sign into the user portal (aka CyberArk) and click on the “APD Service Desk” icon.

    a. Click on the icon to open the application.

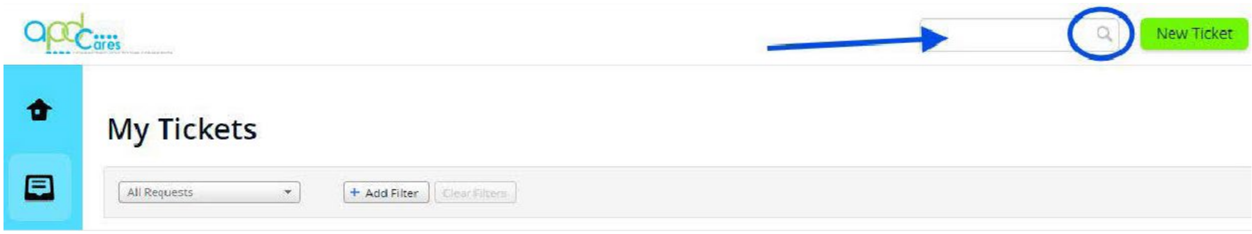
2. Click the ticket icon on the left side of the screen.
    a. If you hover over the ticket icon it will display “My Tickets.”



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



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



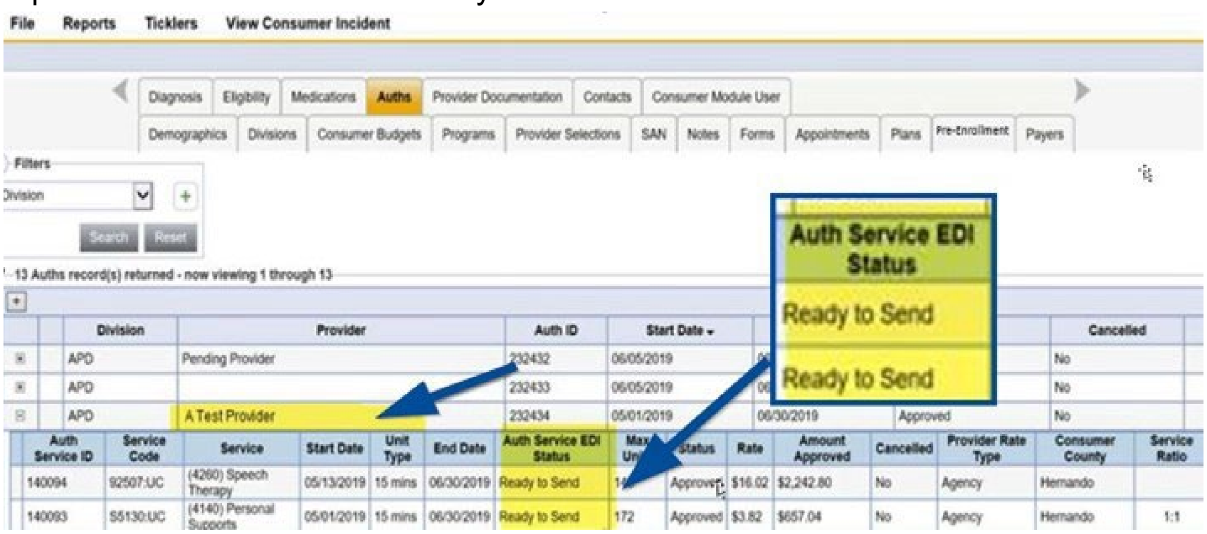
March 1, 2025

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

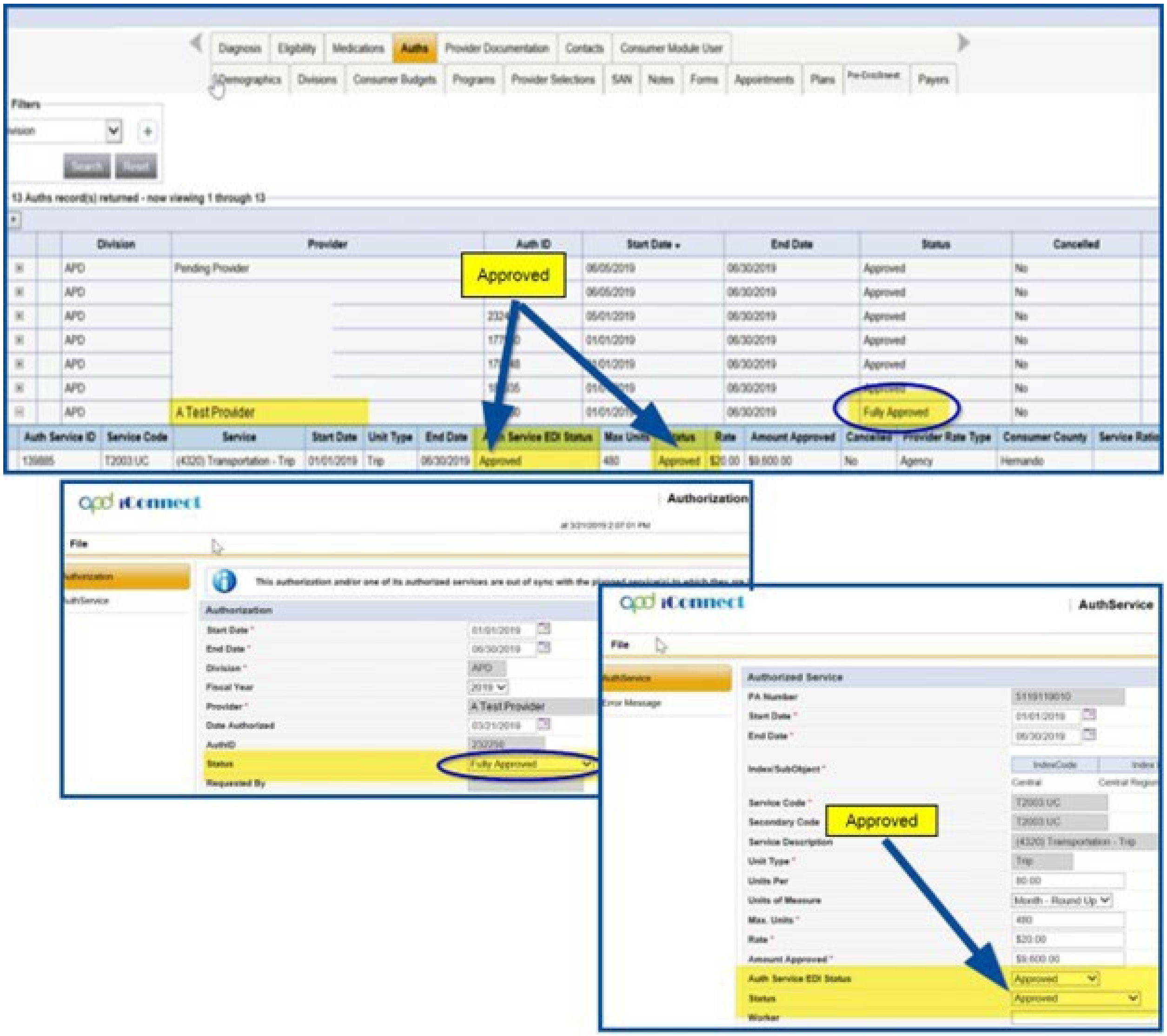
A Waiver Support Coordinator (WSC) initiates the approval process for a service authorization when the WSC creates or updates an existing service authorization in iConnect. This creates a PA number, so that services rendered may be billed.
This process involves the iConnect interface with the Florida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

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

Once the inbound information is received, the PA number is assigned to the authorization in iConnect.
Example of an authorization in “Ready to Send” status:



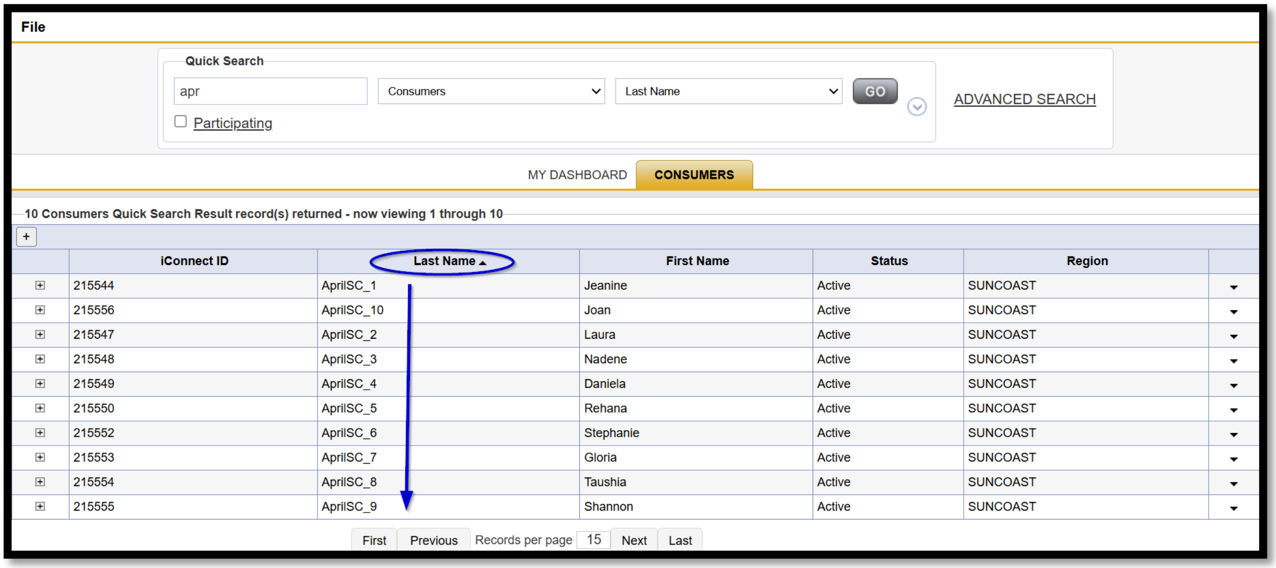
Example from iConnect of an authorization in “Approved” status from the Auth tab, within the list view grid, after opening the authorization, and opening the AuthService tab:


Diagnosis
Eligibility
Medications
Auths
Provider Documentation
Contacts
Consumer Module User
Demographics
Divisions
Consumer Budgets
Programs
Provider Selections
SAN
Notes
Forms
Appointments
Plans
Payers
Filters
13 Auths record(s) returned - now viewing 1 through 13
Division
Provider
Auth ID
Start Date
End Date
Status
Cancelled
Pending Provider
A Test Provider
Fully Approved
Approved
Auth Service ID
Service Code
Service
Unit Type
Max Units
Rate
Amount Approved
Provider Rate Type
Consumer County
(4320) Transportation - Trip
Agency
Hernando
Approved
iConnect
Authorization
File
Authorization
AuthService
Start Date
End Date
Division
Fiscal Year
Provider
Date Authorized
AuthID
Status
Requested By
iConnect
AuthService
File
Authorized Service
Error Message
PA Number
Index/SubObject
Service Code
Secondary Code
Service Description
Unit Type
Units Per
Units of Measure
Max. Units
Rate
Amount Approved
Auth Service EDI Status
Worker
Approved

April 1, 2025

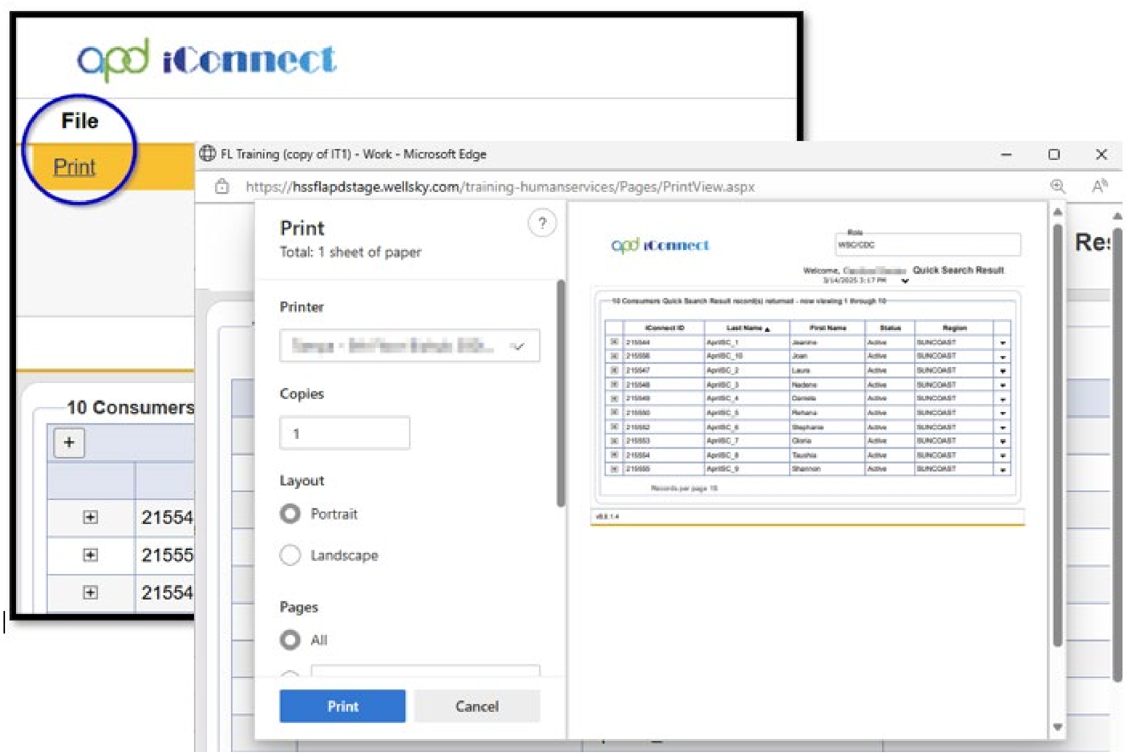
How are the list view grids used in iConnect?

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



Can iConnect users print the list view grids?

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



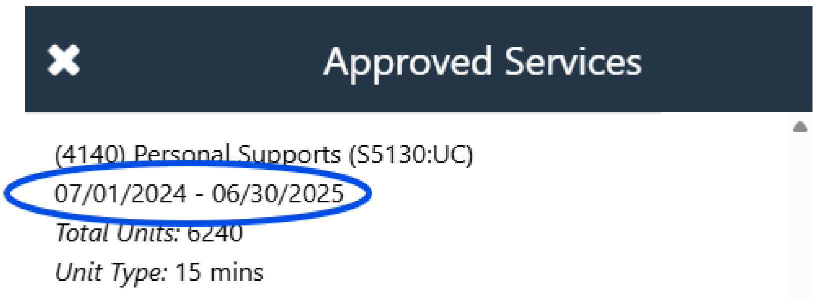
May 1, 2025

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.

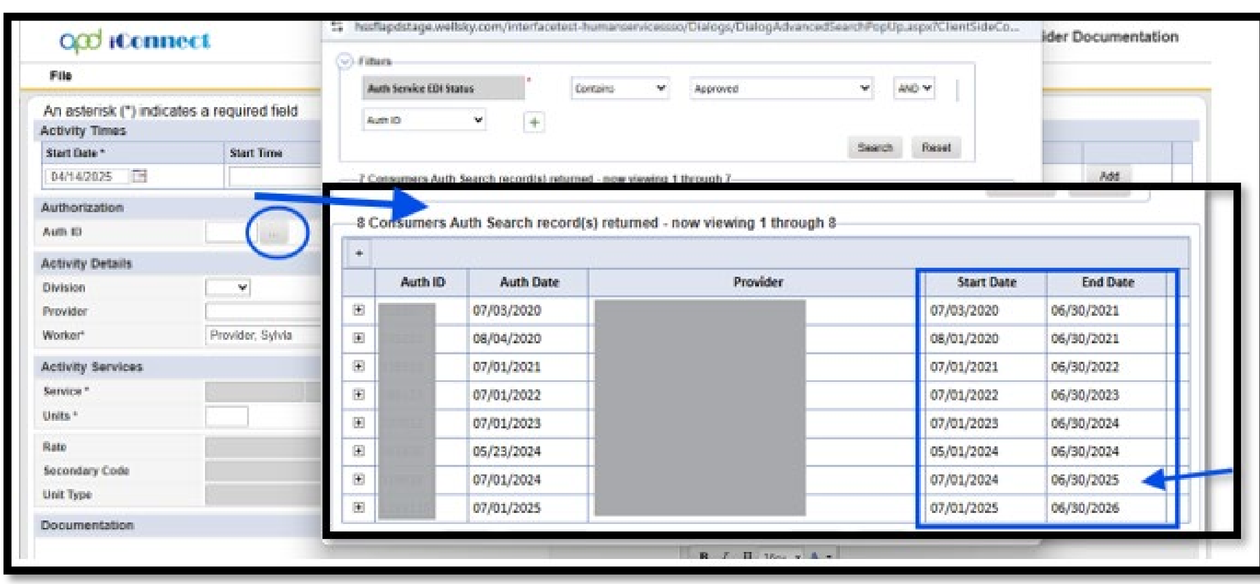
EVV Mobile Site

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	[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

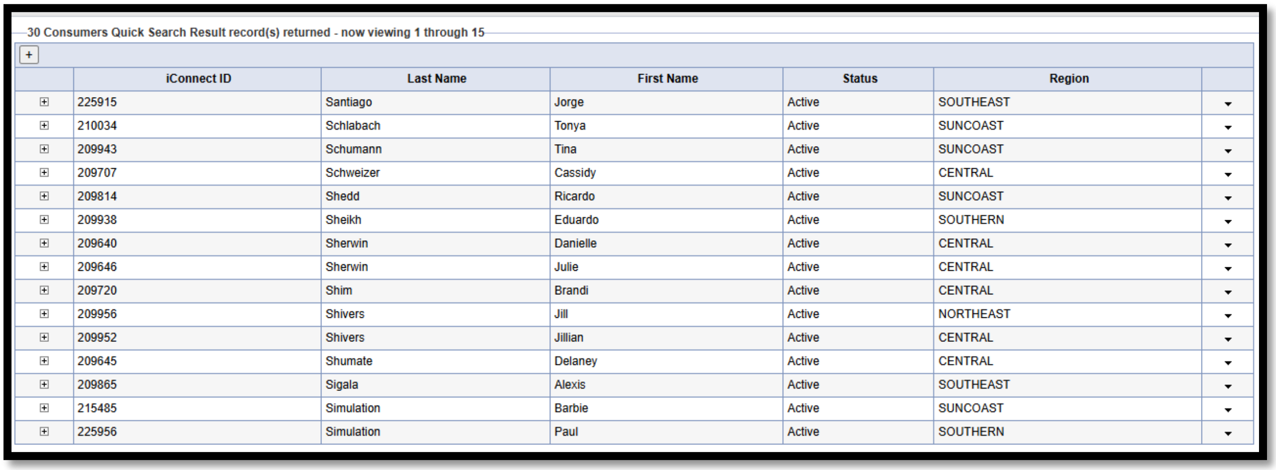
Auth Service ID	Service Code	Service	Start Date	End Date	Max Units	Auth Service EDI Status	Max Amount
[redacted]	S5130:UC	(4140) Personal Supports	07/01/2023	04/30/2024	2915	Approved	$15,945.05
[redacted]	S5135:UC	(4080) Life Skills Development - Level 1 (Community Inclusion)	07/01/2023	06/30/2024	5222	Approved	$26,475.54

⊞	[redacted]	05/23/2024	[redacted]	05/01/2024	06/30/2024

June 1, 2025

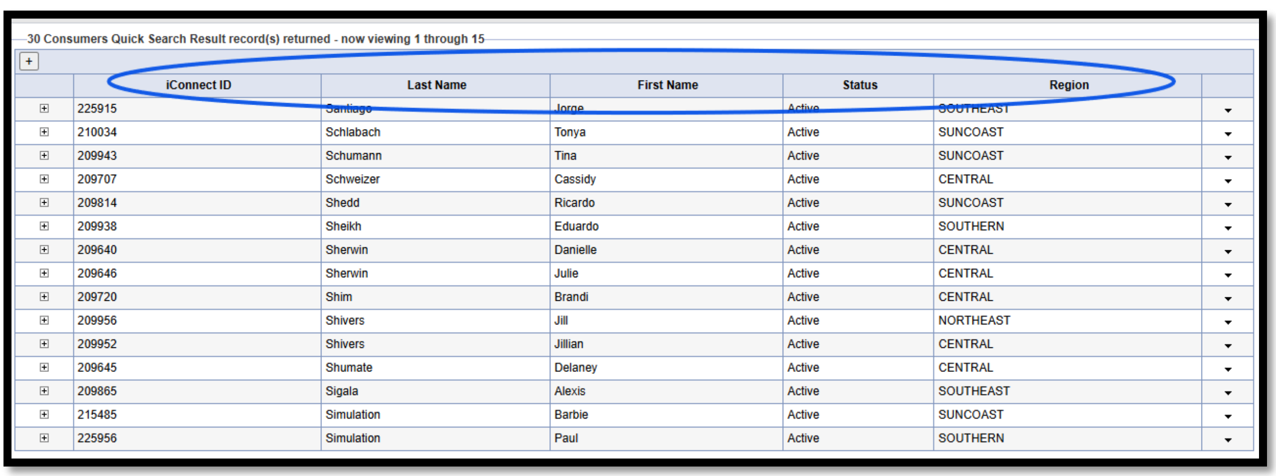
Sorting the List View Grid in iConnect

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

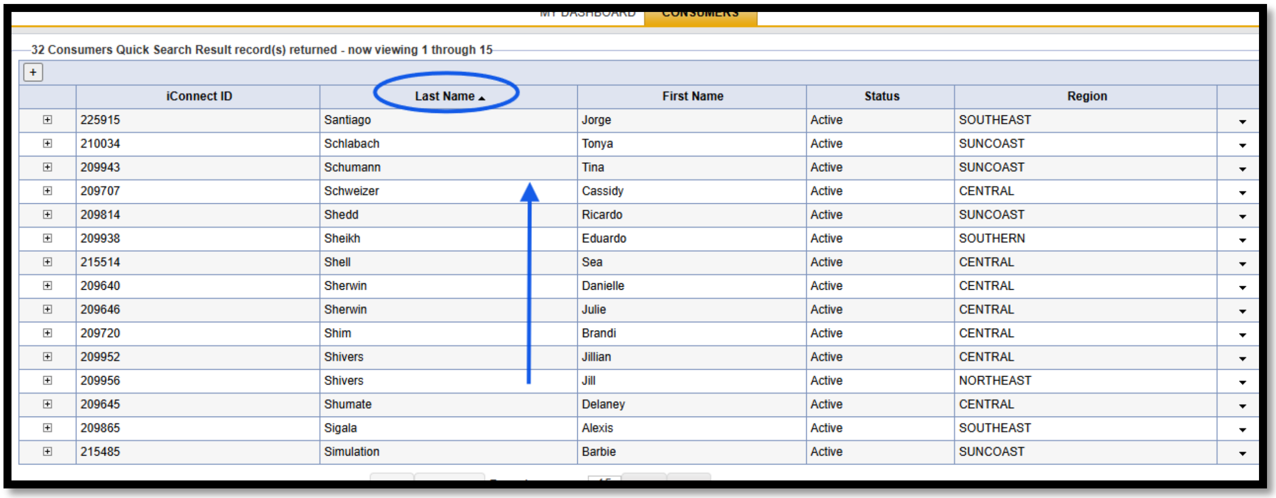
iConnect ID	Last Name	First Name	Status	Region
225915	Santiago	Jorge	Active	SOUTHEAST
210034	Schlabach	Tonya	Active	SUNCOAST
209943	Schumann	Tina	Active	SUNCOAST
209707	Schweizer	Cassidy	Active	CENTRAL
209814	Shedd	Ricardo	Active	SUNCOAST
209938	Sheikh	Eduardo	Active	SOUTHERN
209640	Sherwin	Danielle	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

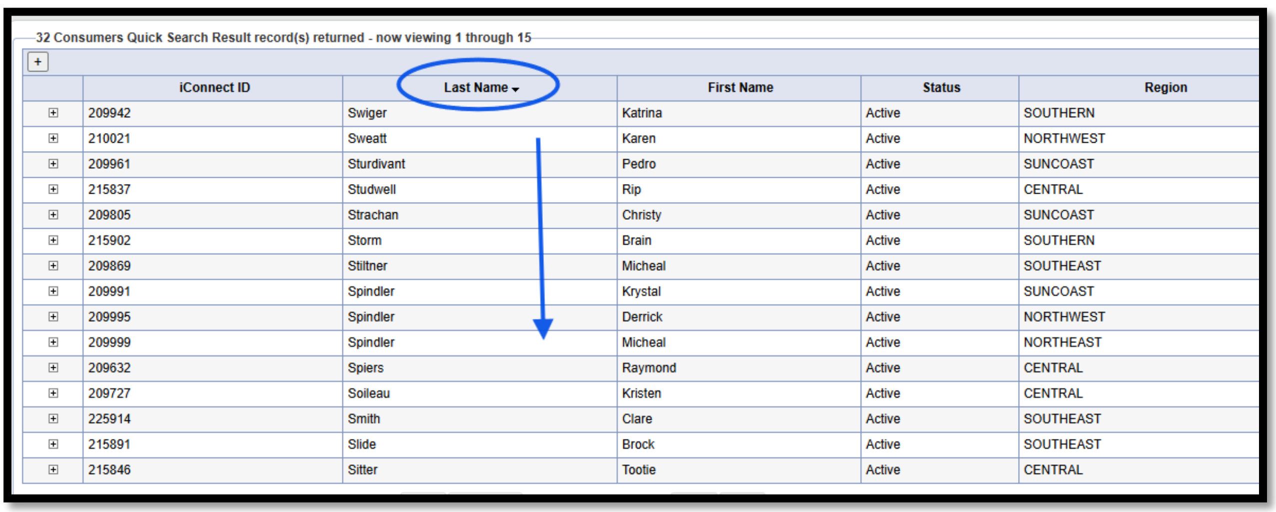
iConnect ID	Last Name	First Name	Status	Region
225915	Santiago	Jorge	Active	SOUTHEAST
210034	Schlabach	Tonya	Active	SUNCOAST
209943	Schumann	Tina	Active	SUNCOAST
209707	Schweizer	Cassidy	Active	CENTRAL
209814	Shedd	Ricardo	Active	SUNCOAST
209938	Sheikh	Eduardo	Active	SOUTHERN
209640	Sherwin	Danielle	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

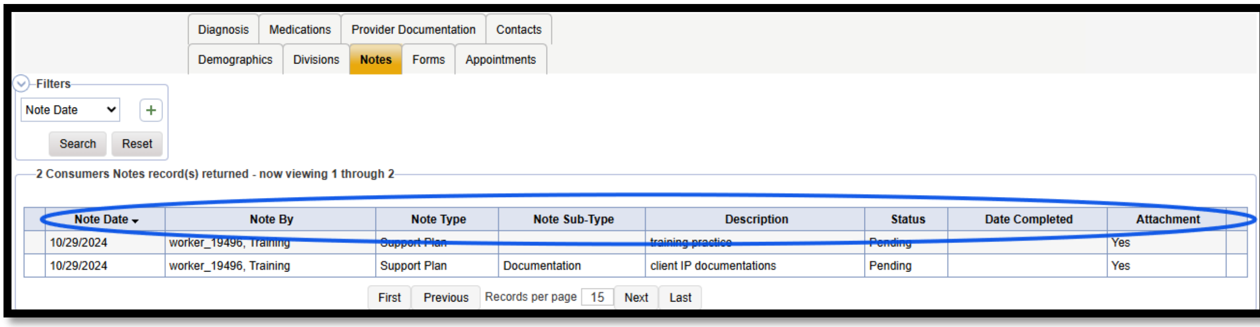
iConnect ID	Last Name ▲	First Name	Status	Region
225915	Santiago	Jorge	Active	SOUTHEAST
210034	Schlabach	Tonya	Active	SUNCOAST
209943	Schumann	Tina	Active	SUNCOAST
209707	Schweizer	Cassidy	Active	CENTRAL
209814	Shedd	Ricardo	Active	SUNCOAST
209938	Sheikh	Eduardo	Active	SOUTHERN
215514	Shell	Sea	Active	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



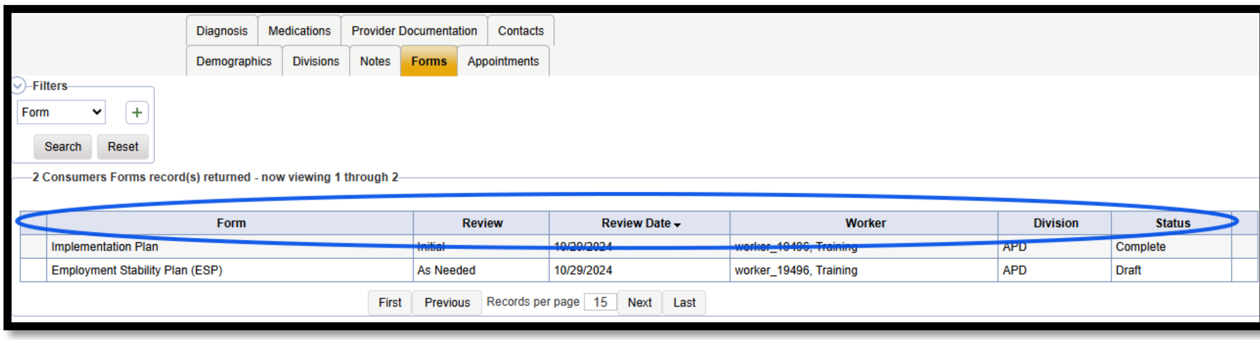
32 Consumers Quick Search Result record(s) returned - now viewing 1 through 15

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

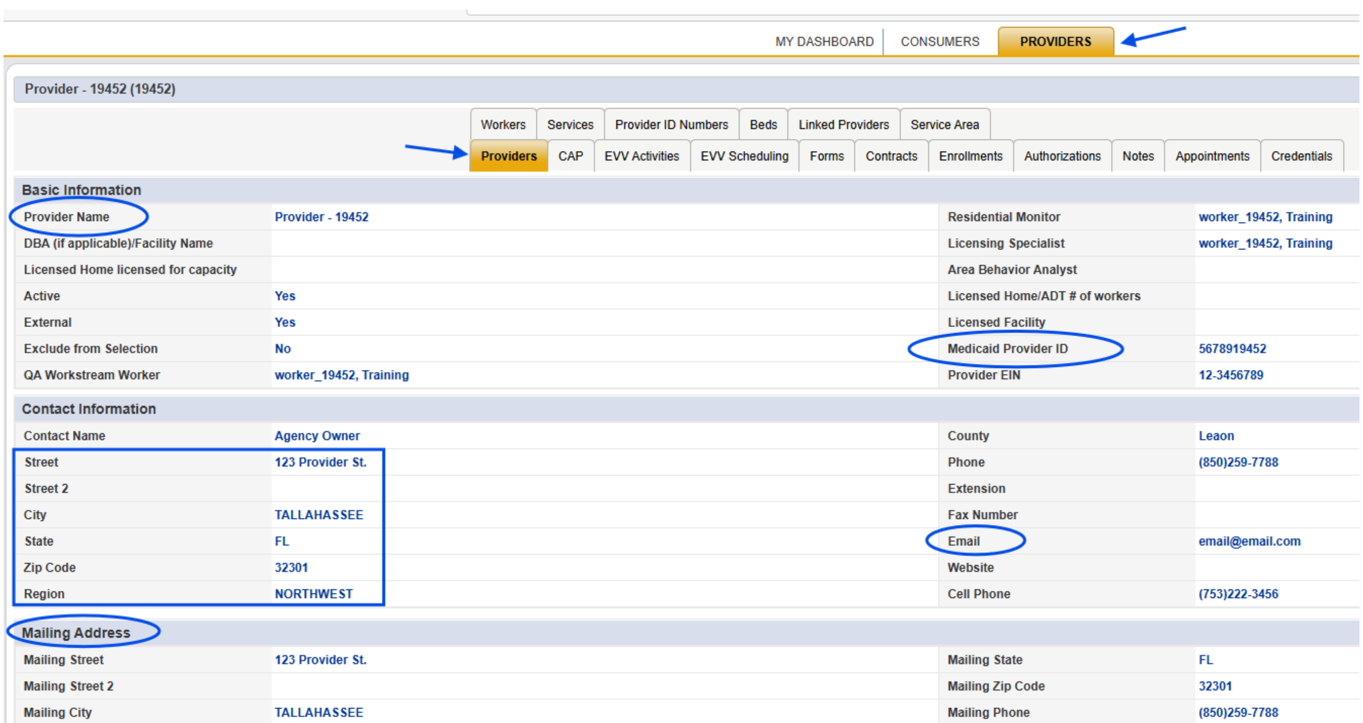
The Florida Medicaid Management Information System (FMMIS) Provider Interface exchanges provider-related data with iConnect so that both systems have up-to-date and synchronized records for service delivery and billing. Some of the data elements that are updated every night by the FMMIS Provider Interface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

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

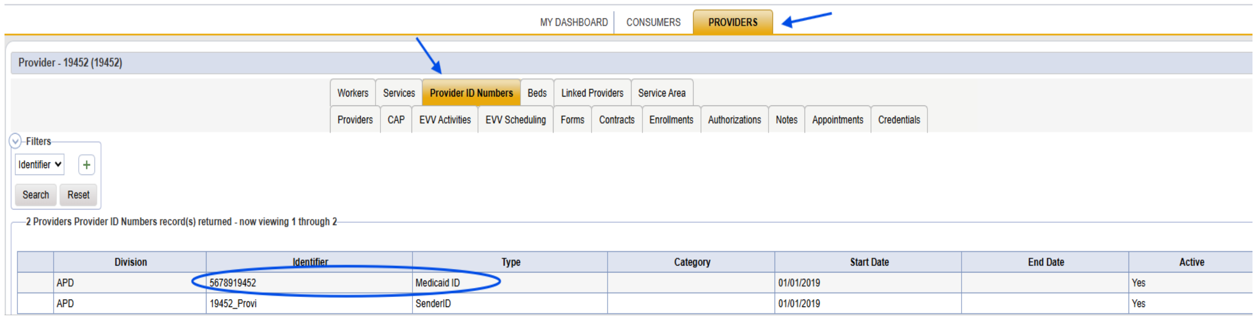
Providers need to edit their information in [FMMIS](), since the FMMIS Provider Interface will update the Provider's information every night in iConnect. If edits are made directly into iConnect, the FMMIS Provider Interface will override those edits nightly.

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.

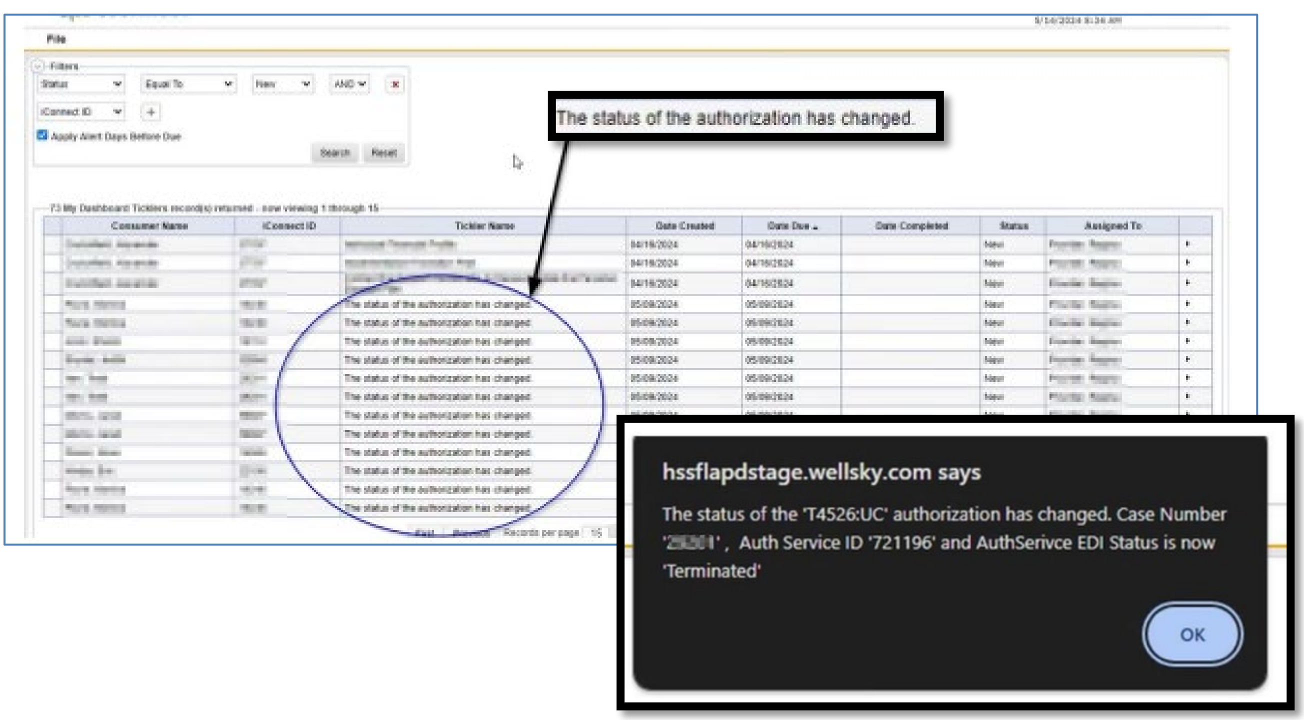


August 1, 2025

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**.**



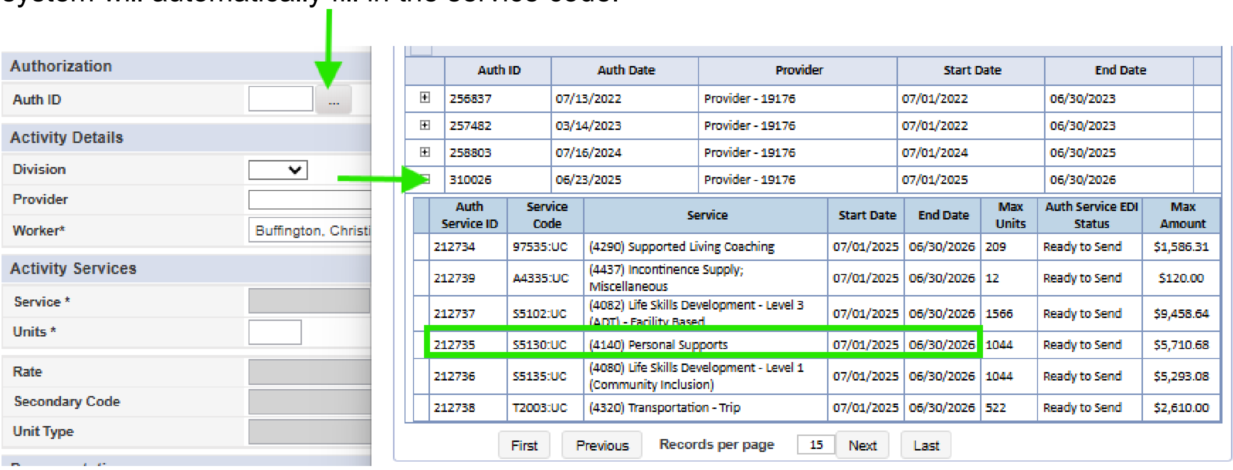
September 1, 2025

Choosing the Correct Authorizations in iConnect

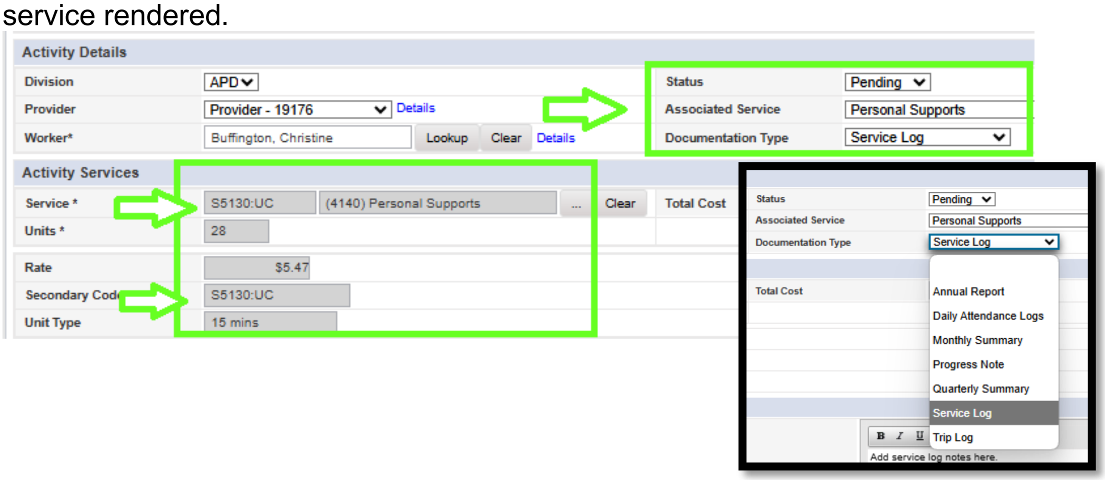
When documenting a service rendered, the worker will need to utilize the correct authorization for the service that they provided. It is imperative that the worker knows what service is being rendered. That will come from the agency owner, supervisor, or designee and as identified within the authorization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

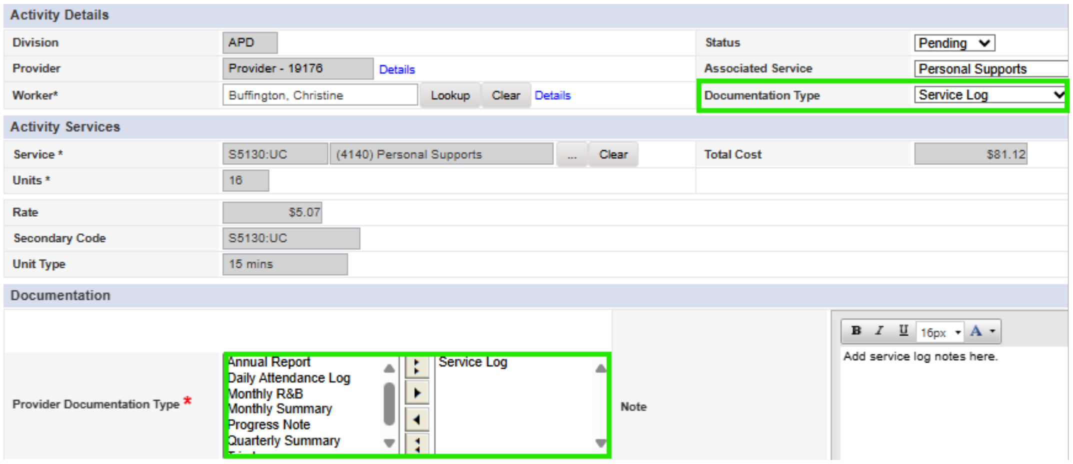
TIP: When pulling the authorization through the ellipsis (**…**), click on the plus (**+**) sign, to bring up all services for the consumer that the provider has an authorization for. Once the service name has been selected, the system will automatically fill in the service code.



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.

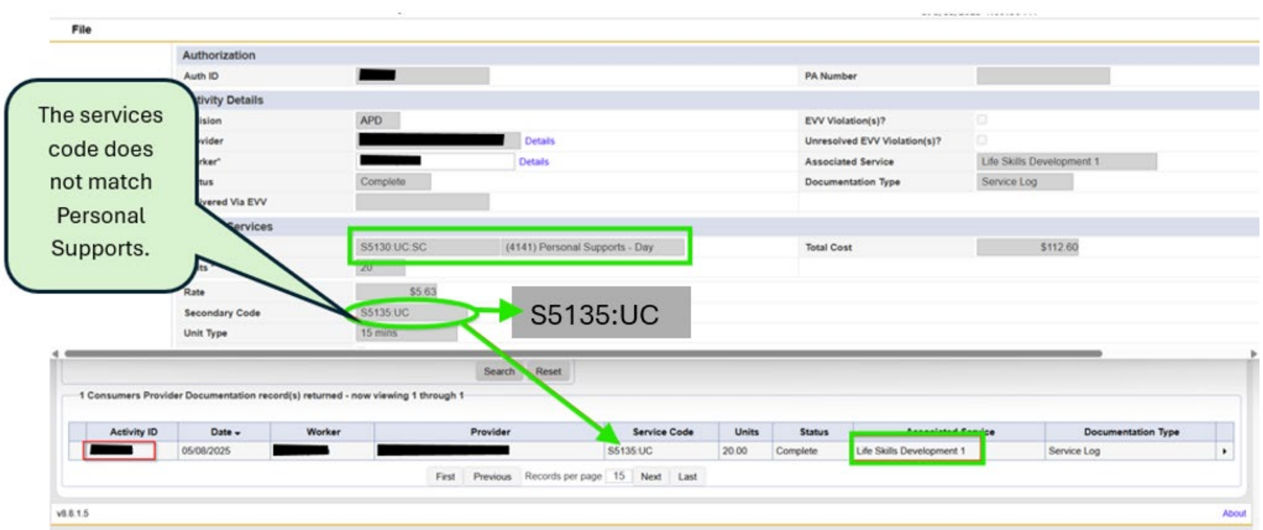


Under the **Documentation** row, the worker will select the correct **Provider Documentation Type** from the selection box, utilizing the arrows to move that documentation type(s) to the right side of the empty box.



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 new provider documentation entry with the data captured along with the correct service.

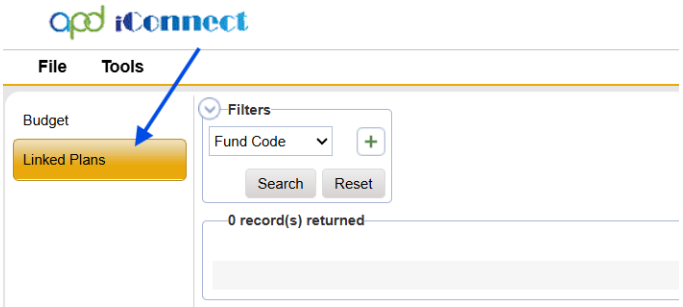
The provider documentation below is an example of a provider documentation that would need to be reentered. The Secondary Code matches the code for Life Skills Development 1; however, the Service listed is Personal Supports Day. This occurred due to the incorrect Service being selected originally and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



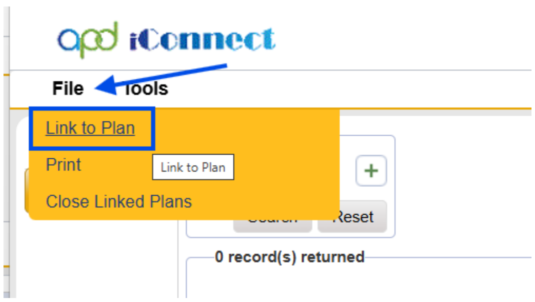
Opening Plans from the Consumer Budgets tab – WSC Edition

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.

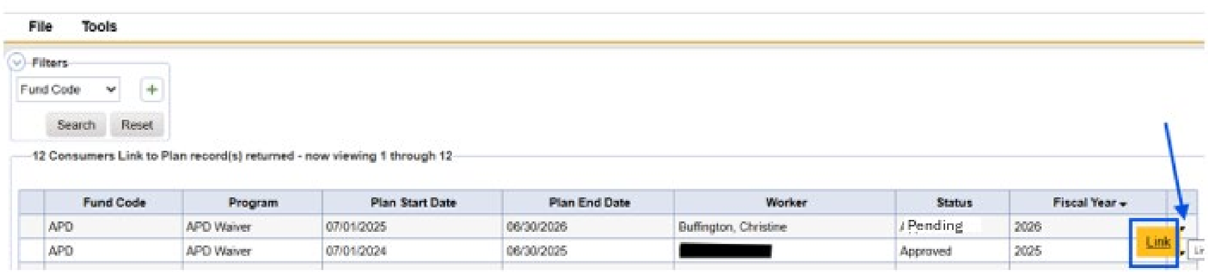
1. The WSC is in the Consumer Budgets tab and the Linked Plan bookmark.



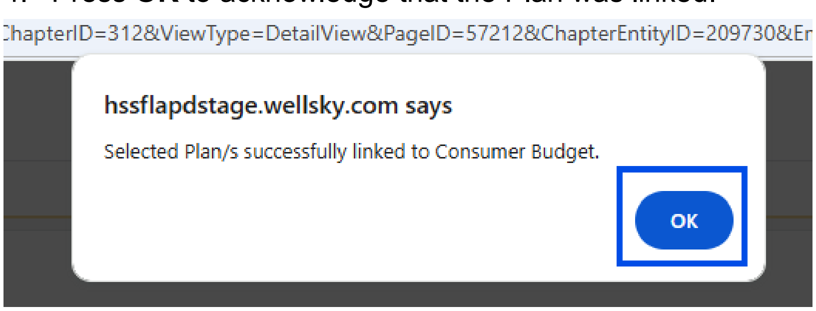
2. Navigate to **File** and select **Link to Plan**.



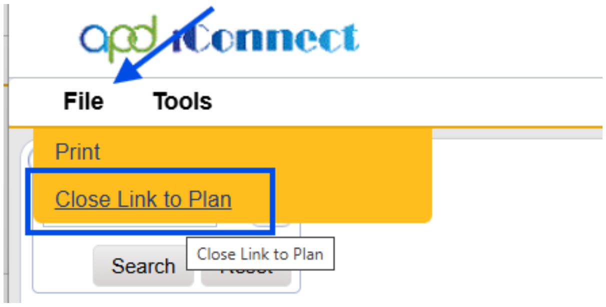
3. Navigate to the appropriate plan from the list view grid and utilize the caret click **Link**.



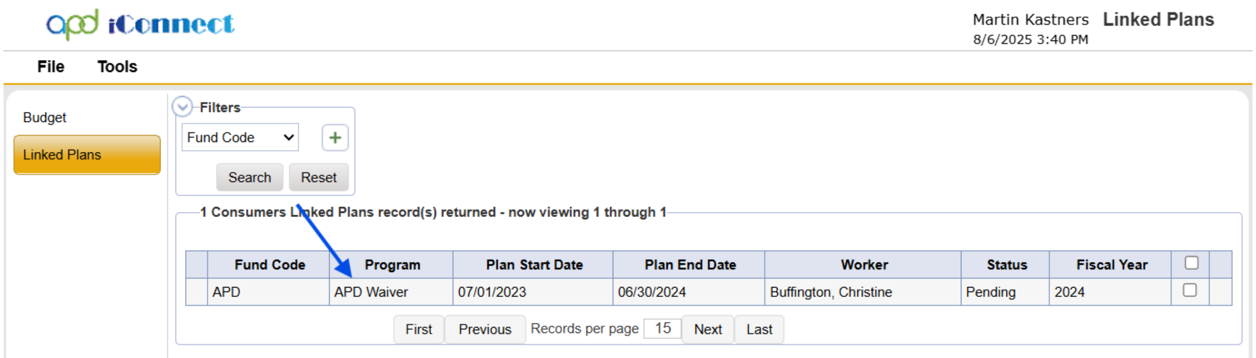
4. Press **OK** to acknowledge that the Plan was linked.



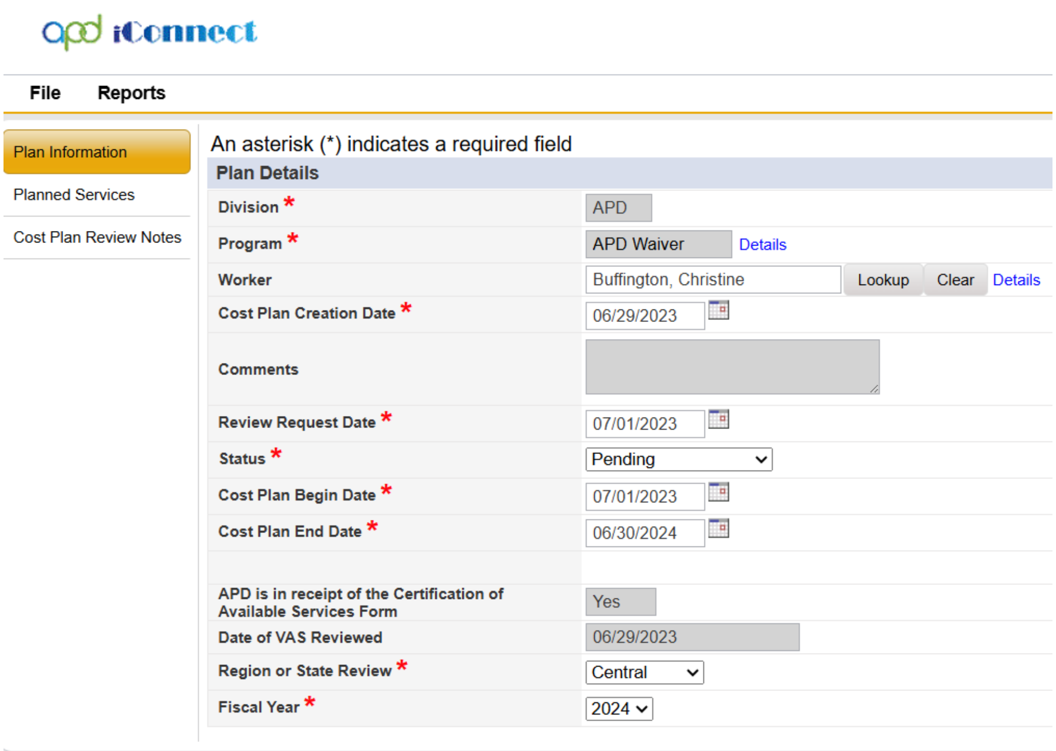
5. Go to **File** and select **Close Link to Plan**.



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

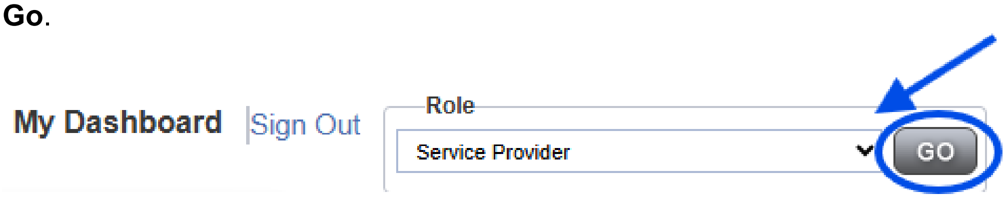
Reviewing Provider Documentation

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.

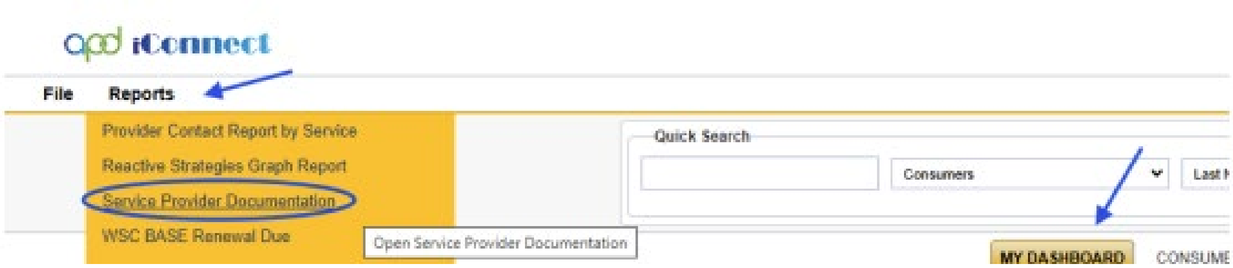
The Service Provider Documentation Report contains the following information:
(Please review the Service Provider Documentation Report Job Aid for any updates to the report.)

- 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

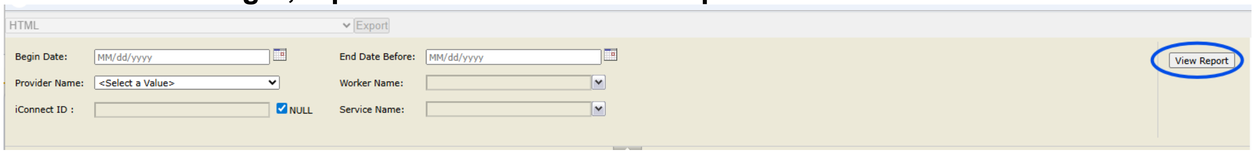
1. To begin, log into iConnect and set Role = Service Provider or Service Provider Worker, as applicable. Click **Go**.



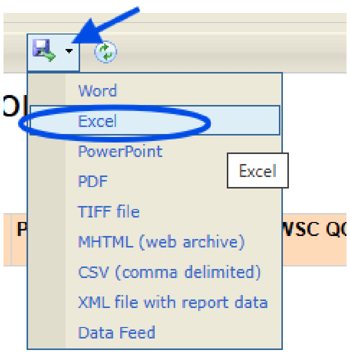
2. On My Dashboard, navigate to the **Reports** menu and select Service Provider Documentation.



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**.



4. 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.]

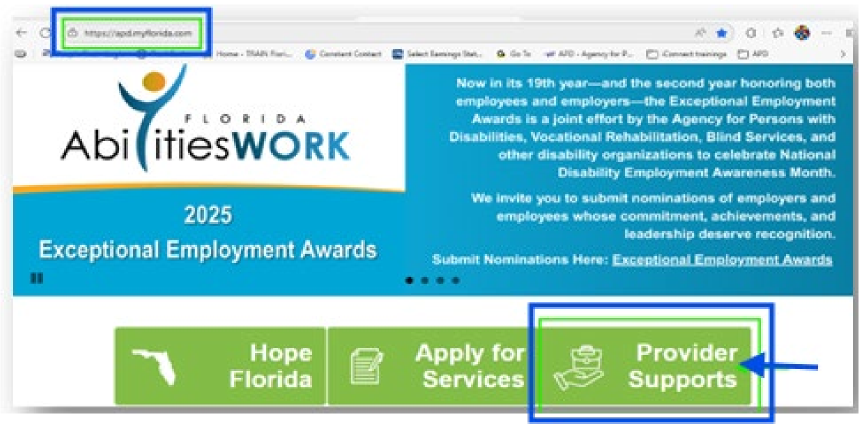
REMINDER: *Personal Health Information (PHI) will be pulled when exporting the Service Provider Documentation Report. It is the responsibility of all iConnect users to ensure that their systems follow all HIPAA requirements.*

November 1, 2025

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

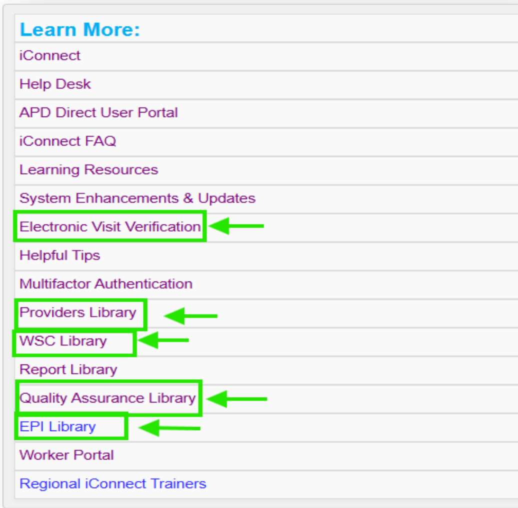
Do you hear the Regional iConnect trainers say, “Let’s go look at the manual,” but are not certain how they get there so quickly?
Manuals and job aids have been created to assist providers with workflows and procedures in iConnect. At times they are updated to illustrate enhancements made to iConnect.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

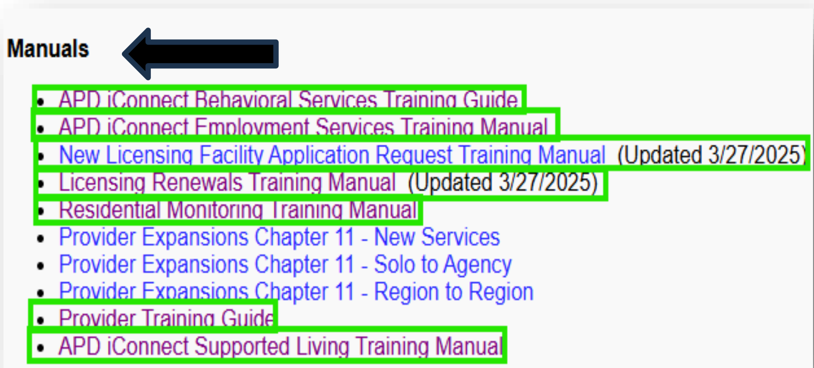


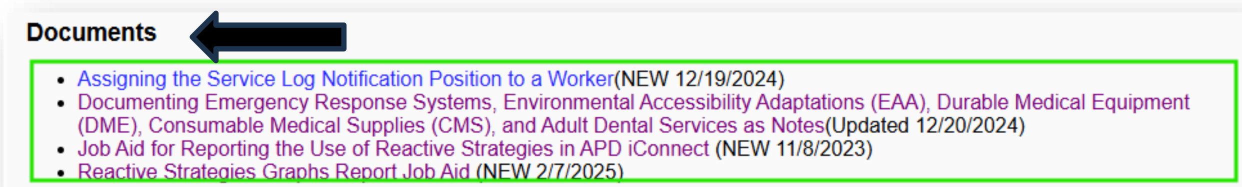
3. Then select **APD iConnect**

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]).



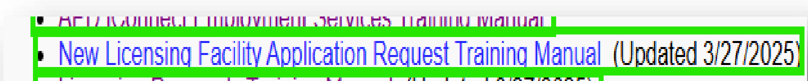
5. Navigate to the **Manuals or Documents** and select the topic that you are interested in, and click on it





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.

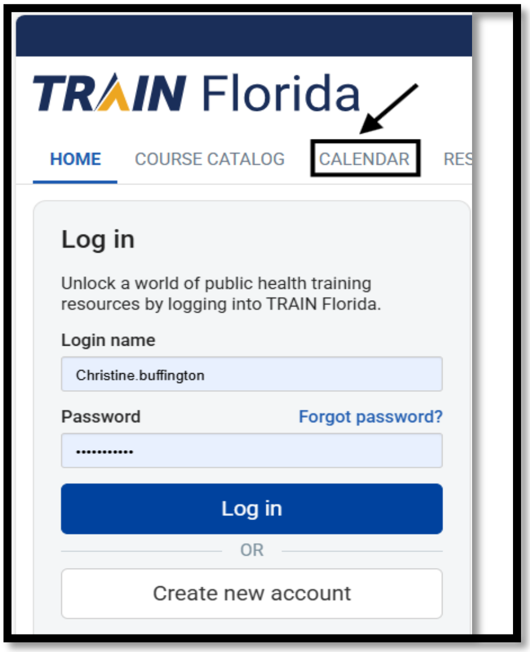
Table of Contents

December 1, 2025

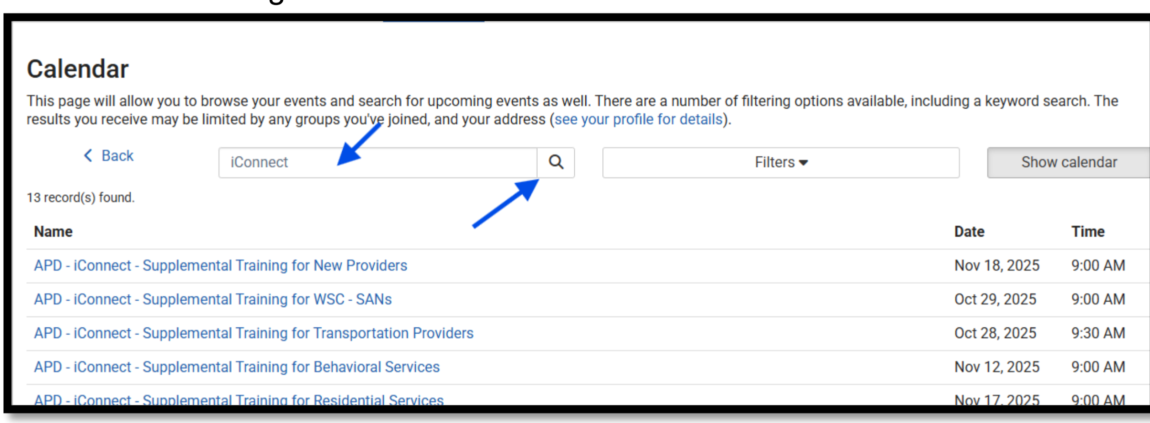
How can I find TRAIN Florida courses using the calendar?

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

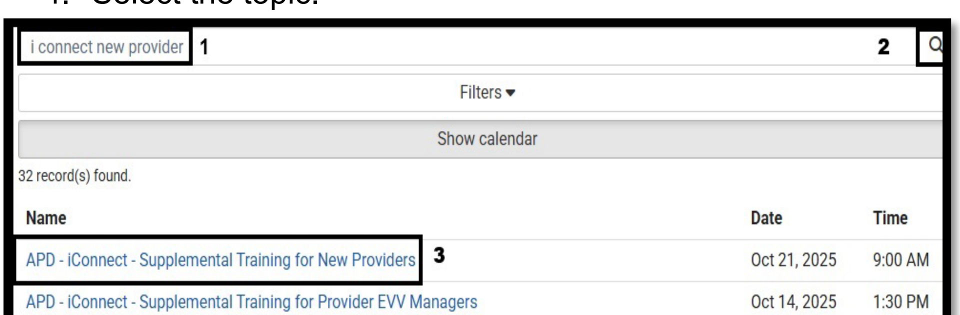
1. Log into TRAIN Florida at www.train.org.
2. Click **Calendar** from the navigation bar.



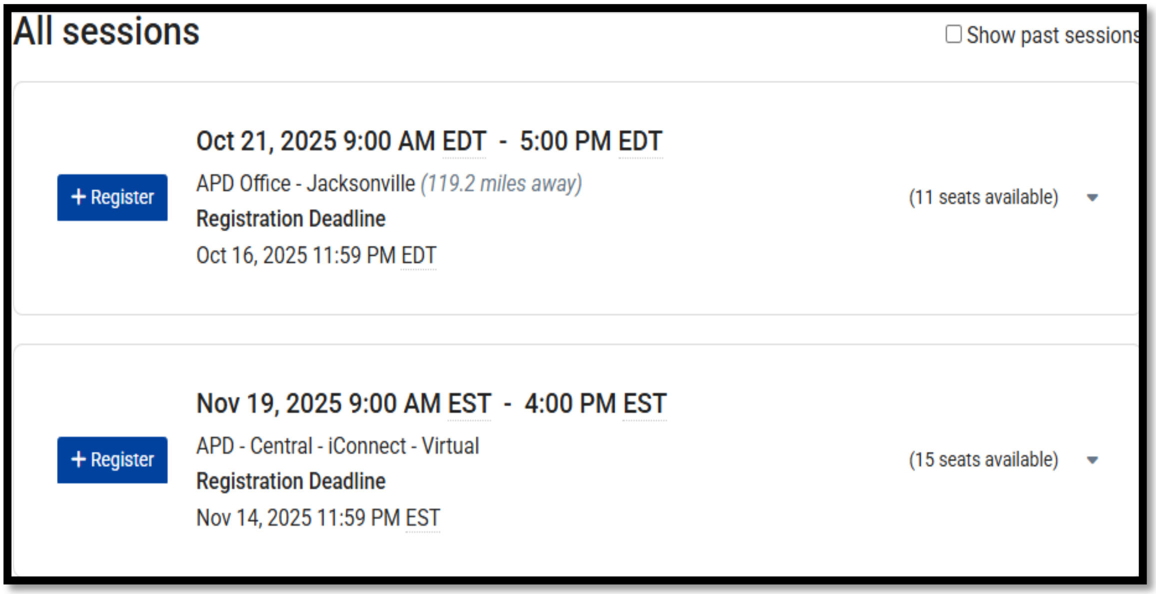
3. In the search bar, type in the topic name and click the search icon. In the example below, we are searching for iConnect.



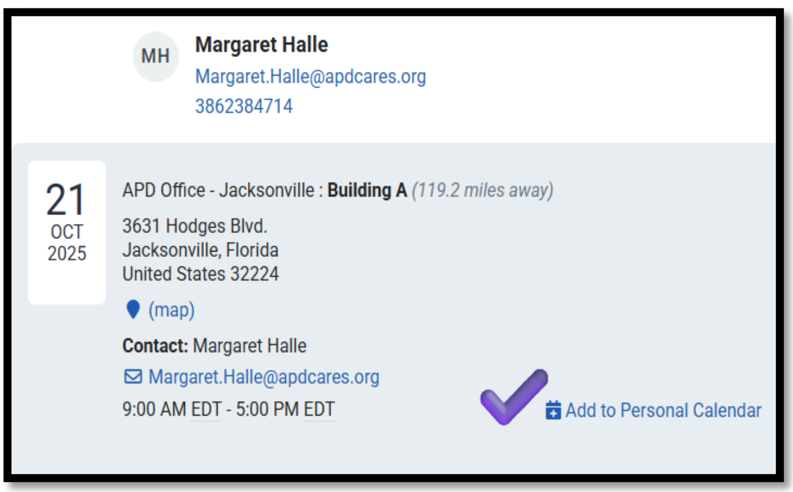
4. Select the topic.



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



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



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

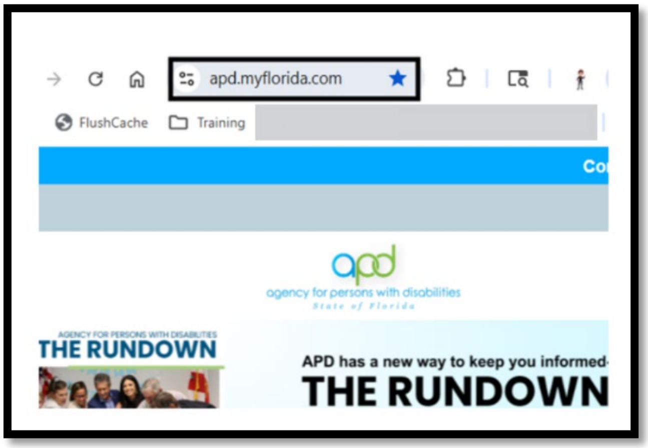
January 1, 2026

Report Library in iConnect

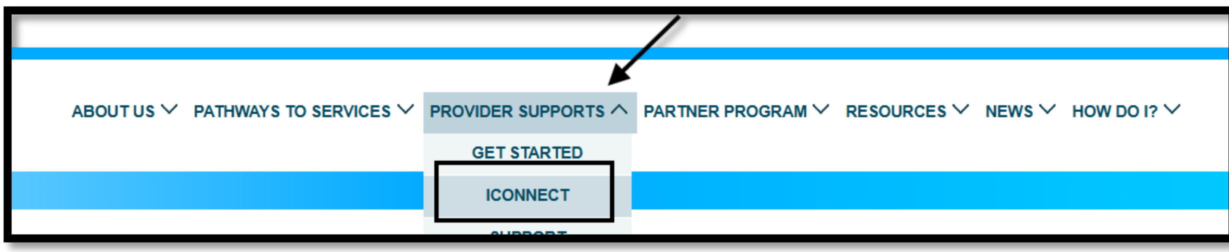
Happy New Year! We are thankful and appreciate all the work that you do for our clients.

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

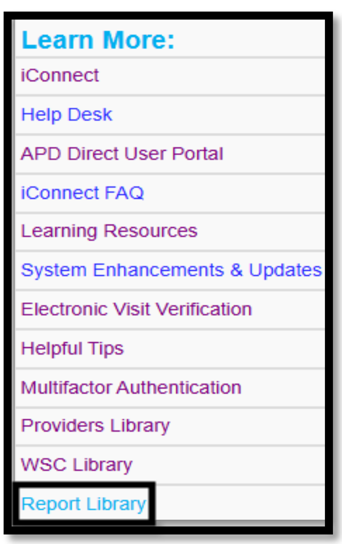
1. To locate the Report Library, navigate to the APD website: https://apd.myflorida.com.



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



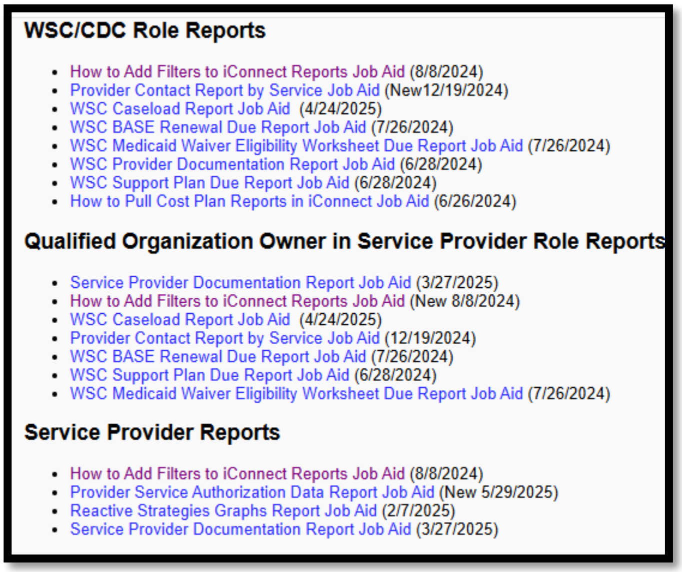
3. Select **Report Library.**



4. **Report Library**

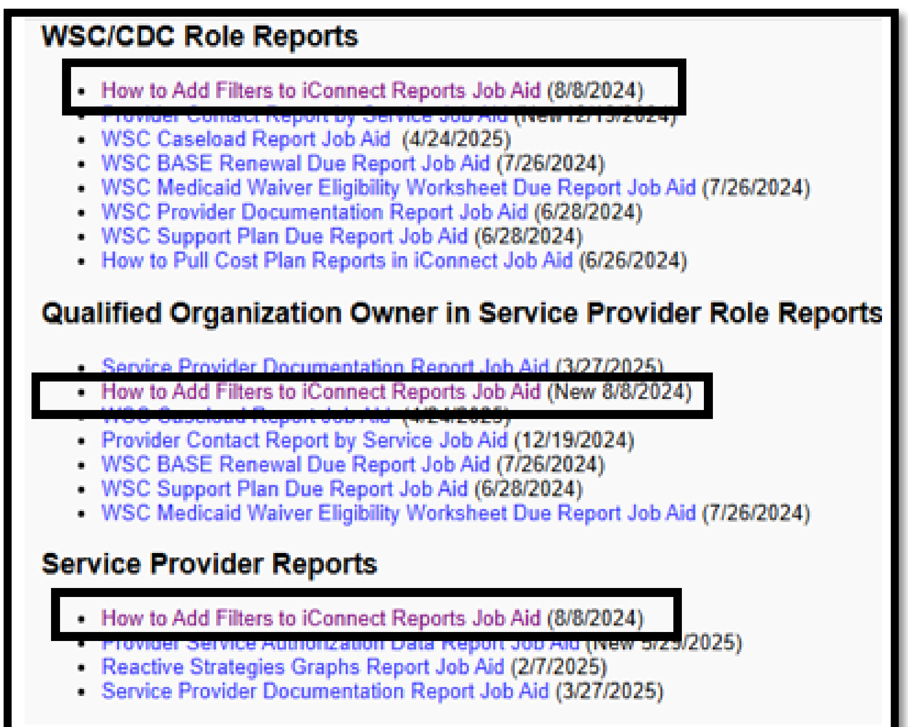
This library contains instructions for users to access and use reports from iConnect, listed by iConnect user role.

- For example, reports in the section <u>WSC/CDC Role Report</u>s can only be accessed by users with that particular role.



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

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



March 1, 2026

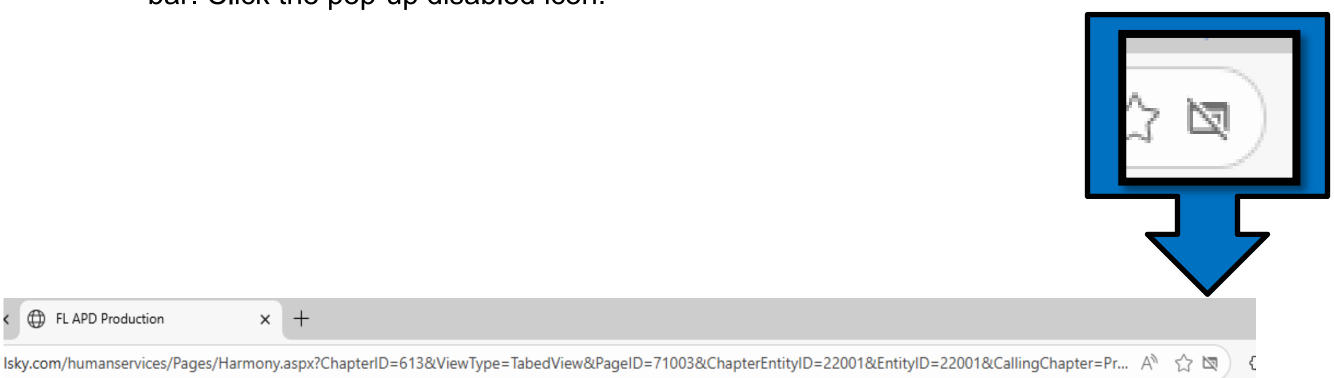
Disabling Pop-Up Blockers

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

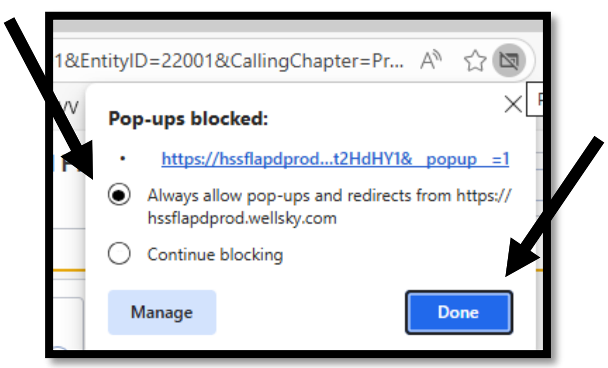
1. Linked Providers
2. Search Screens
3. Notifications
4. Alerts
5. Plan Validation Report
6. New SAN
7. New Planned Service

Allowing Pop-ups on iConnect

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

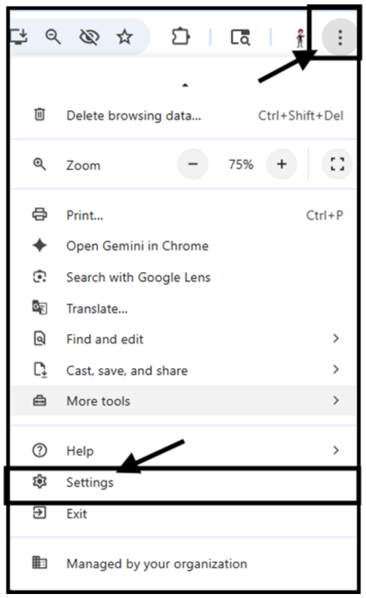


2. The **Pop-ups blocked** screen will display. Select the option to always allow pop-ups and redirects. Then click **Done**.

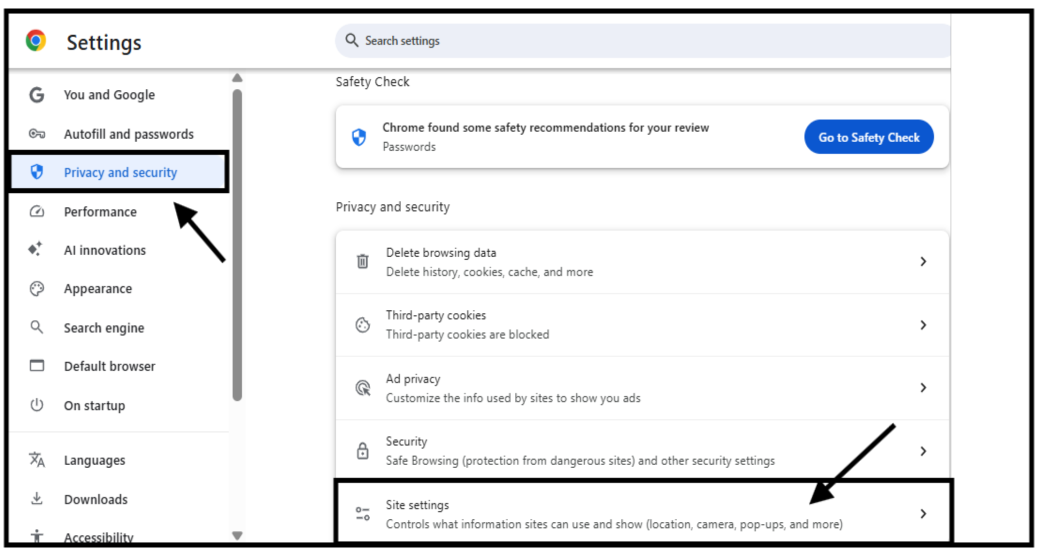


Manage Pop-ups in the Google Chrome web browser

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



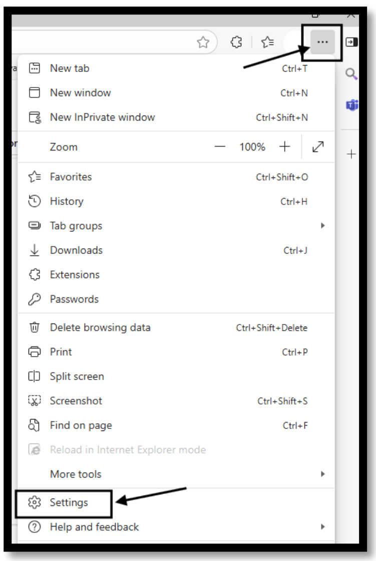
2. In settings, go to **Privacy and security** on your left and then select **Site settings.**



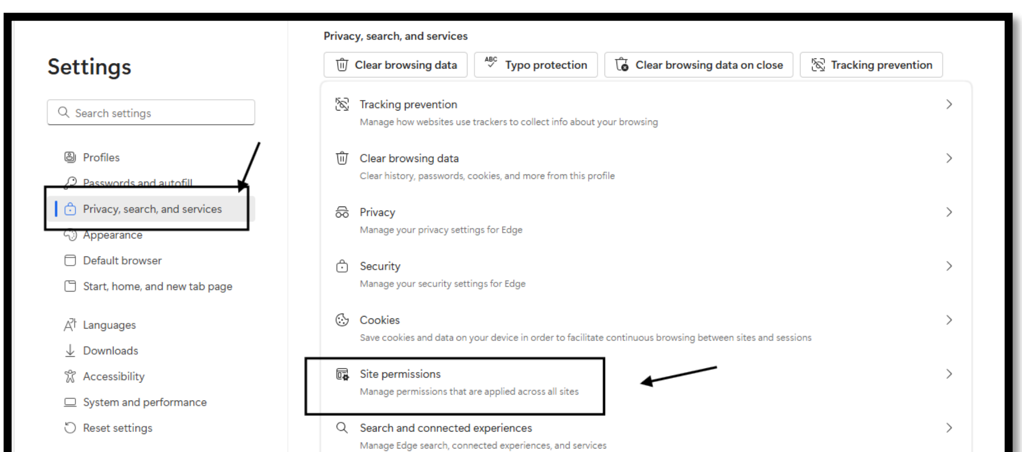
3. Scroll down and click **Pop-ups and redirects**. Verify that https://hssflapdprod.wellsky.com is listed.

Manage Pop-ups in the Microsoft Edge web browser

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

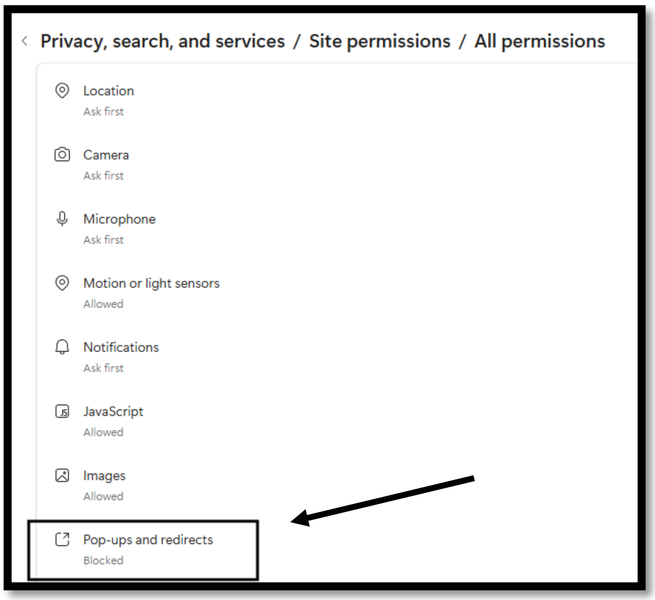


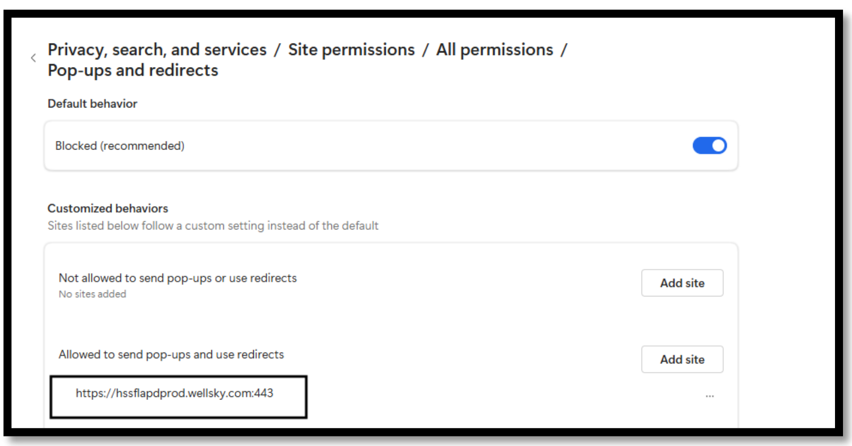
2. In settings, go to **Privacy, search, and services** on your left and then select **Site permissions**.



3. Select **All permissions**.

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





Clearing your Cache

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

Why should you clear your cache?

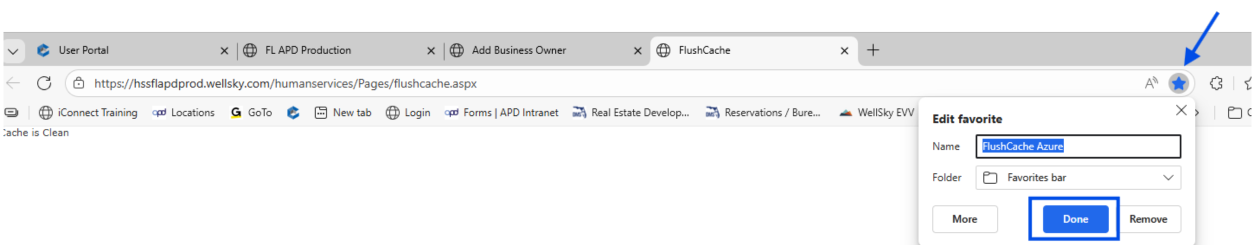
- **Fix website issues:** A cache can store old files for a website. Clearing it can fix formatting or loading problems if the data on the cached version is outdated.
- **Improve performance:** A cache that is too full can slow down your browser. Clearing it frees up resources and can make your browser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

So, how do you clear your cache?

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

To Bookmark or save to favorites:

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



April 1, 2026

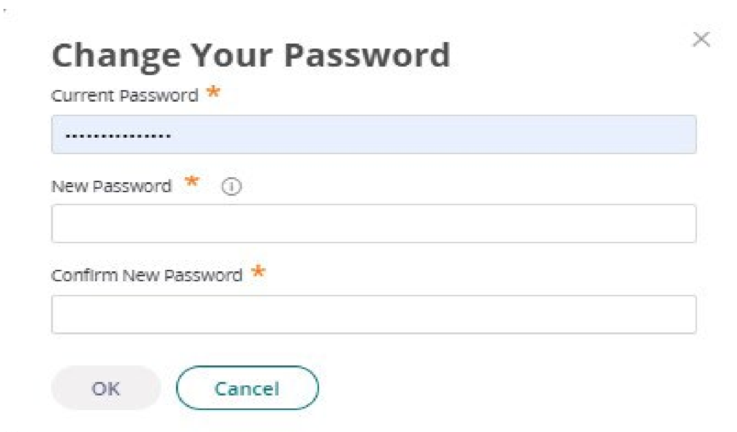
Changing your APD Password

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

Follow these steps to complete the password change:

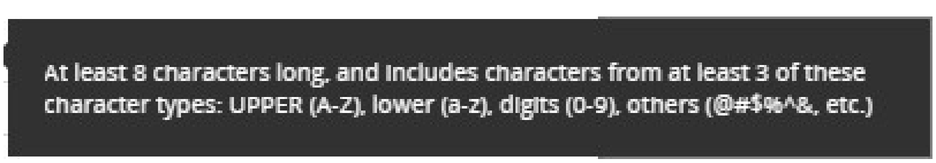
1. Click the word **here** on the notification.

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

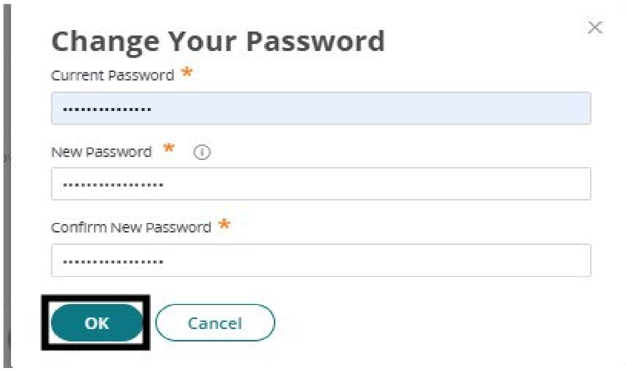


3. Enter your current password.

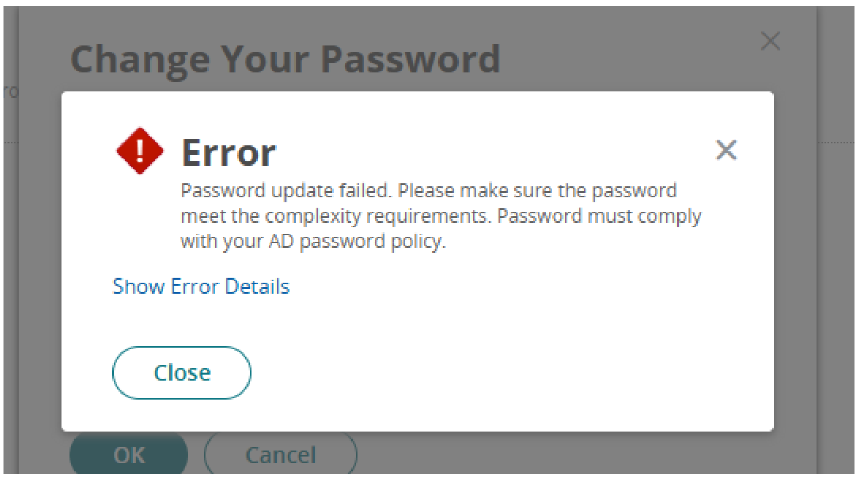
4. Create a new password that includes the following:
    a. At least 8 characters long
    b. Includes characters from at least 3 of these types
        i. Upper case (A-Z)
        ii. Lower case (a-z)
        iii. Digits (0-9)
        iv. Special characters (@#$%^&, etc.)

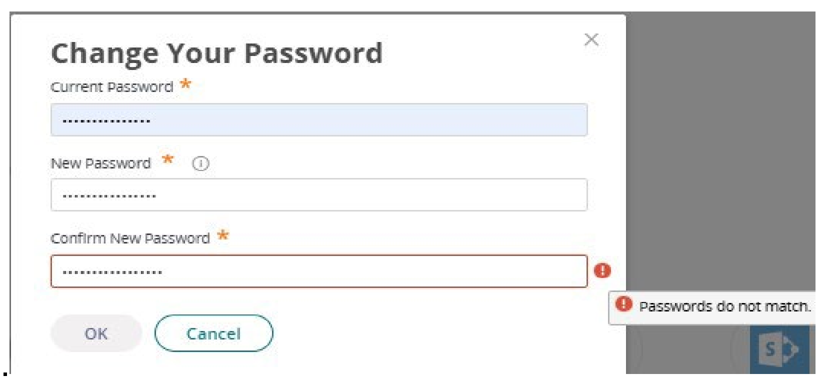


5. Enter and confirm your new password, then click **OK**.



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





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

apd Cares
CONNECTING YOU TO THE COMMUNITY

Password change confirmation

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

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

By email:
security@apdcares.org

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

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

May 1, 2026

Reviewing Notes on Your "My Dashboard"

iConnect users may receive Notes displayed on their **My Dashboard** in iConnect. Notes should appear as **Pending**, **Complete**, or as an **Alert**. No matter the status all Notes require review.

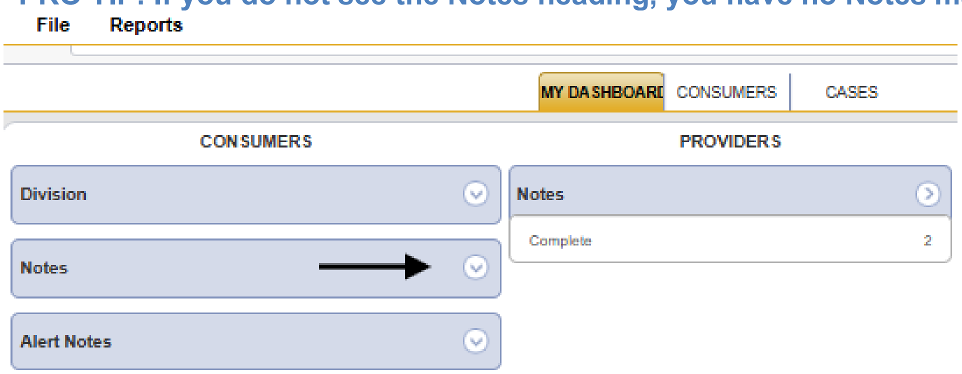
- **Pending Notes** indicate that action or a response is needed.
- **Complete Notes** indicate the sender has finished their task; however, you may still need to read or follow up.
- **Alert Notes** are used in rare circumstances, such as the death of the consumer or a change in the WSC. For additional information on Alert Notes visit the Helpful Tips for May 2024.

Regardless of status, users are responsible for reviewing all Notes. Mark Notes as "Read" once you have reviewed or completed the associated task. This allows the Note to be resent to you if necessary. For additional guidance, you can refer to the job aid, Utilizing Notes in iConnect.

How to view Notes

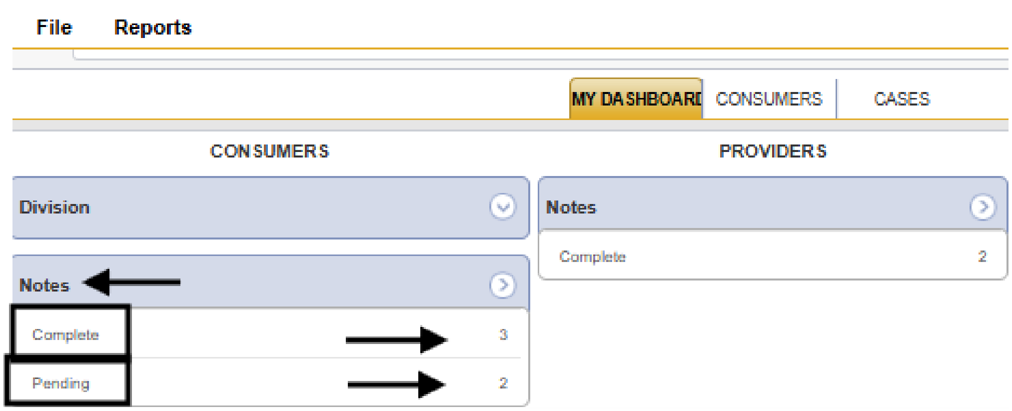
1. Log in to iConnect. Your **My Dashboard** page will display automatically.
2. Under the **Consumers** section, select the **Notes** tab.

   PRO TIP: If you do not see the Notes heading, you have no Notes marked as Read.



   PRO TIP: If the arrow is pointing down, click the arrow to view the Notes.

3. When opened, the Notes tab will show Complete and Pending Notes.

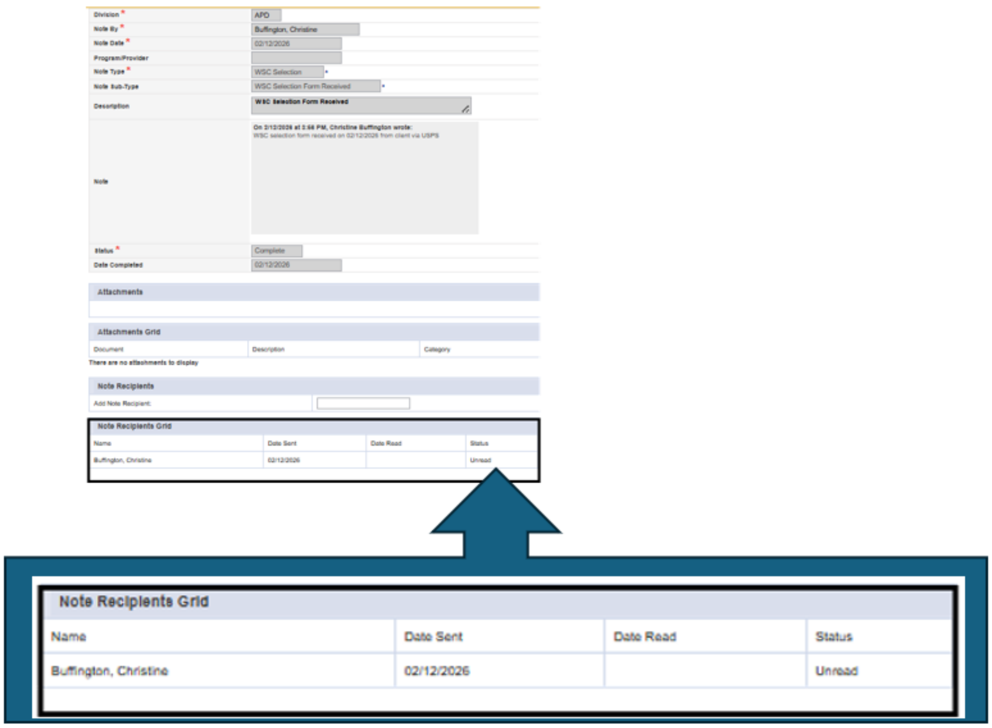


4. Click on **Complete or Pending** to view all of the Notes in the corresponding status. The list view grid will display; select a row to open that specific Note.

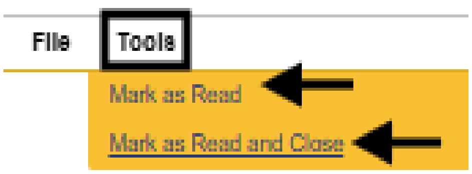
3 My Dashboard Notes record(s) returned - now viewing 1 through 3

iConnect ID	Consumer ▲	Note Type	Note Sub Type	Note Date	Subject	Author	Status	☐
103481	Flower, Pansy	WSC Selection	Selection Form Sent	02/12/2026	Selection form Sent	Buffington, Christine	Complete	☐
103481	Flower, Pansy	WSC Selection	WSC Selection Form Received	02/12/2026	WSC Selection Form Received	Buffington, Christine	Complete	☐
103481	Flower, Pansy	Waiver Enrollment	Waiver Offer	02/12/2026	Waiver Offer sent	Buffington, Christine	Complete	☐

5. Review the Note to determine whether any action or response is required. The "Note Recipients Grid" shows the date the Note recipient(s) have received the Note and marked the Note as **"**Read".



6. To mark the Note as "Read", in the Note Details page, go to **Tools > Mark as Read** or **Mark as Read and Close**.



PRO TIP: If you mark a *Support Plan or Support Plan Provider Copy Note* as "Read", you will no longer have access to that Note. Make sure to download that document before marking it as "Read" or leave it "Unread" for future access.

7. After marking it as "Read", the Note will be removed from the My Dashboard. Notes can be reviewed in the record they were created in except for the Support Plan or the Support Plan Provider Copy Notes.

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

	iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Description	Author	Status	
	103481	Flower, Pansy	WSC Selection	Selection Form Sent	02/12/2026	Selection form Sent	Buffington, Christine	Complete	
	103481	Flower, Pansy	Waiver Enrollment	Waiver Offer	02/12/2026	Waiver Offer sent	Buffington, Christine	Complete	

June 1, 2026

Locating your Specialist

Service Providers have quick access to identify key specialists assigned to them. Specialists are displayed in the provider's Corporate and/or Facility record(s) in iConnect. Once you know the specialist assigned to you, you can reach out to them by looking up their contact information on the **APD Website**.

Below are definitions for both the Provider's Corporate Record and the Facility Record. Listed below each record type is the assigned APD Specialist's title as listed on the record in iConnect, followed by their APD title.

Provider Corporate Record: This record will be associated with authorizations and contains the services offered by the provider.

- QA Workstream Worker – Provider Enrollment Coordinator

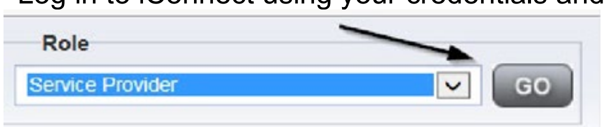
Facility Record: This record contains information about a licensed facility that is linked to the Provider Corporate Record.

- QA Workstream Worker – Provider Liaison
- Residential Monitor – Residential (Group Home) Monitor
- Licensing Specialist – Residential or ADT Licensing Specialist
- Area Behavior Analyst – (Regional) Senior Behavioral Analyst

For additional guidance on identifying the record types, refer to the **Differentiating Agency Vs. Facility Records from Provider Tab in iConnect** job aid.

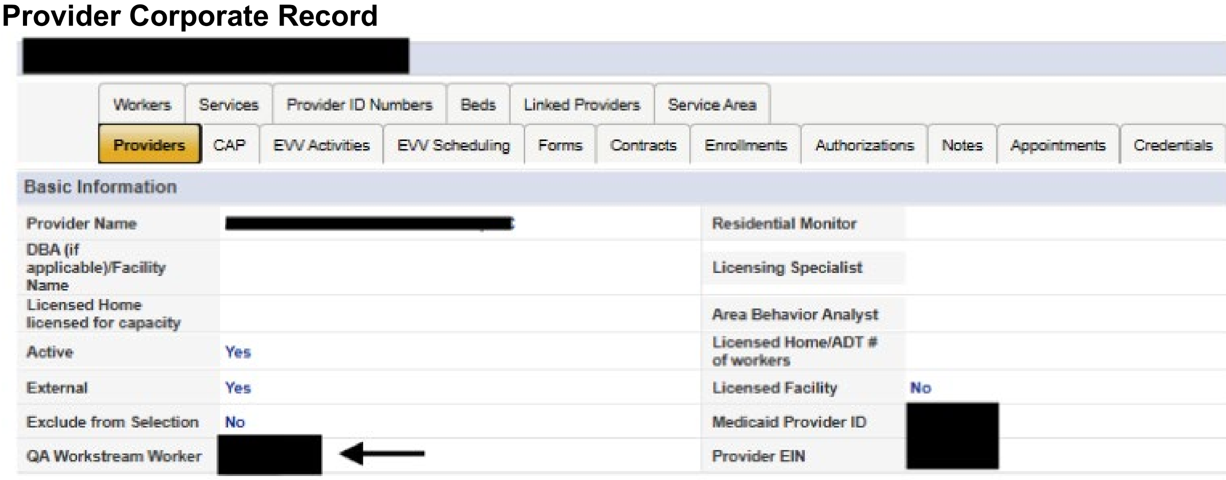
Steps to find your Specialist in iConnect:

1. Log in to iConnect using your credentials and set your Role to Service Provider. Click **Go.**

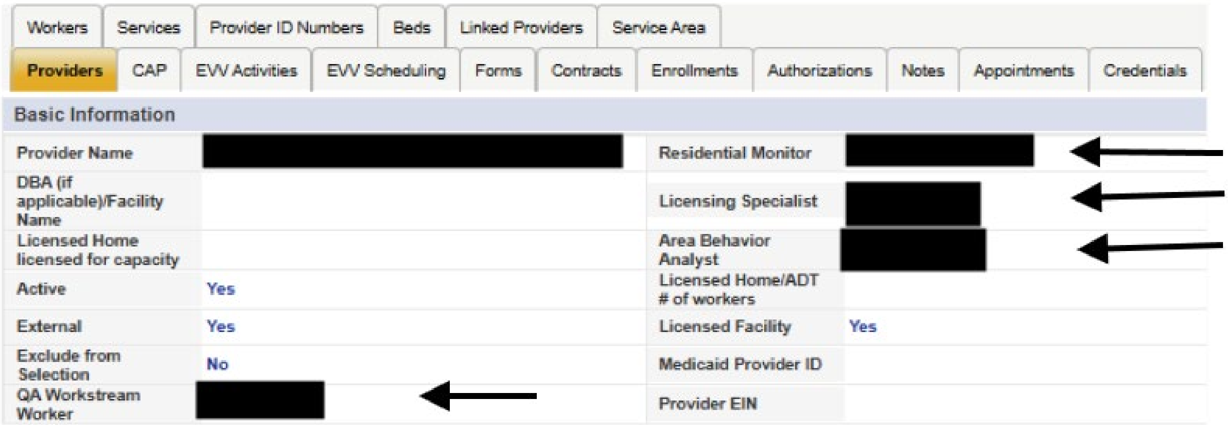


2. You will land on your Providers tab. Under Basic Information, you will find your liaisons, licensing and monitoring staff, and specialists, as applicable.

Provider Corporate Record



Facility Record



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

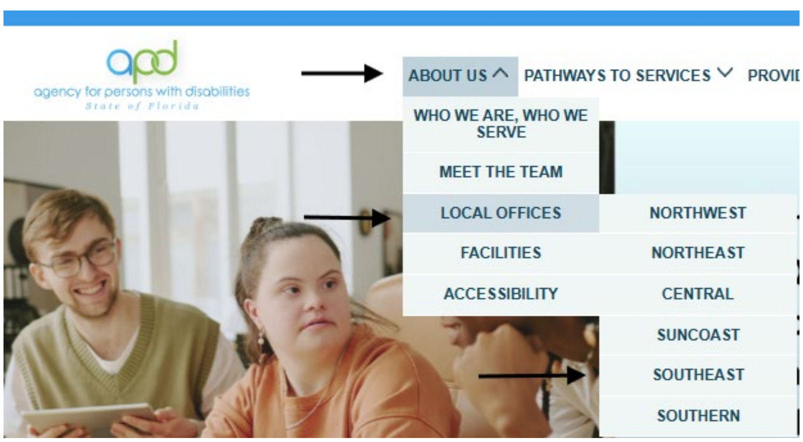
Provider Name	[redacted]	Residential Monitor	[redacted]
DBA (if applicable)/Facility Name		Licensing Specialist	[redacted]
Licensed Home licensed for capacity		Area Behavior Analyst	[redacted]
Active	Yes	Licensed Home/ADT # of workers	
External	Yes	Licensed Facility	Yes
Exclude from Selection	No	Medicaid Provider ID	
QA Workstream Worker	[redacted]	Provider EIN	

Reaching out to your Specialist

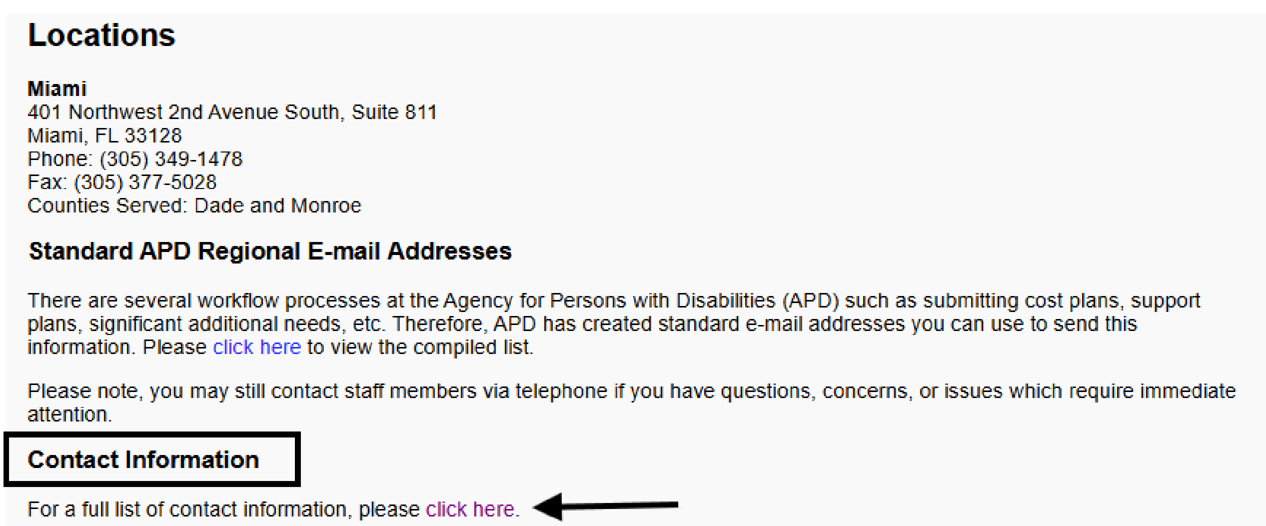
1. Contact your specialist through their APD email. APD email addresses follow the same standardized format: FirstName.LastName@apdcares.org.

   Example: Snow.White@apdcares.org

2. You can also visit the **APD website** to look up their contact information. Under the "**About Us**" section, select "**Local Offices**," then choose your region to view contact information.



3. On the Regions page, scroll down to **Contact Information** and find the "click here" link.



Locations

Miami
401 Northwest 2nd Avenue South, Suite 811
Miami, FL 33128
Phone: (305) 349-1478
Fax: (305) 377-5028
Counties Served: Dade and Monroe

Standard APD Regional E-mail Addresses

There are several workflow processes at the Agency for Persons with Disabilities (APD) such as submitting cost plans, support plans, significant additional needs, etc. Therefore, APD has created standard e-mail addresses you can use to send this information. Please click here to view the compiled list.

Please note, you may still contact staff members via telephone if you have questions, concerns, or issues which require immediate attention.

Contact Information

For a full list of contact information, please click here.

4. A spreadsheet will open, allowing you to search by **Area of Responsibility** or **Staff Name**. The staff member's phone number and email address will be displayed.

Southern Region			
Area of Responsibility	**Staff Name**	**Phone**	**Email Address**
Regional Operations Manager (ROM)	Hillary Jackson	(305) 808-6251	hillary.jackson@apdcares.org
Deputy Regional Operations Manager	Kamicha Ferguson	(305) 810-1026	kamicha.ferguson@apdcares.org
Administrative Assistant II to the Southern Region/Human Resources Liaison	Carmen Toledo	(305) 377-5783	carmen.toledo@apdcares.org
Administrative Assistant	Ana Gutierrez	(305) 349-1478	ana.gutierrez@apdcares.org
Distributed Computer Systems Analyst	Hugo Figueroa	(786) 472-0216	hugo.figueroa@apdcares.org
Data Processing Manager/APD Help Desk Support	Joy Joseph	(305) 377-5004	joy.joseph@apdcares.org
Education and Training Specialist	Eggly Ramos-Monteagudo	(305) 377-5059	eggly.ramos-monteagudo@apdcares.org
Hope Navigator	Patricia Rosario	(305) 810-1035	patricia.rosario@apdcares.org
Hope Navigator	Juan Garcia	(654) 225-3632	juan.garcia@apdcares.org
Senior Attorney	Rosa E. Llaguno	(305) 377-5022	rosa.llaguno@apdcares.org
Administrative Services Manager	Zaida Carmona	(305) 377-7235	zaida.carmona@apdcares.org
Contract Liaison	Lirde Nunez	(305) 377-5169	lirde.nunez@apdcares.org
Billing Invoicing	Ted Donaldson	(305) 377-7286	ted.donaldson@apdcares.org
Billing Invoicing	Serge Nicolas	(305) 377-7237	serge.nicolas@apdcares.org
Provider Development Manager	Rhonda Latham	(305) 377-7436	rhonda.latham@apdcares.org
Regional Incident Management Consultant	Princess Perez	(305)810-1009	princess.perez@apdcares.org
Group Home Monitor/Group Home Lic. Supervisor	Calandra Richardson	(786) 748-0526	calandra.richardson@apdcares.org
Group Home Monitor/Group Home Lic. Supervisor	Khowsky Alexis	(786) 734-7071	khowsky.alexis@apdcares.org
Group Home Monitor/Group Home Lic. Lead	Kavita Ahmed	(786) 265-7000	kavita.ahmed@apdcares.org
Group Home Monitor/Group Home Lic. Specialist	Kristian Mejia	(305) 413-0482	kristian.mejia@apdcares.org
Group Home Monitor/Group Home Lic. Specialist	Jackie Cartaya	(786) 265-7048	jackie.cartaya@apdcares.org
Group Home Monitor/Group Home Lic. Specialist	Cary Alfonso	(786) 972-5359	cary.alfonso@apdcares.org
Group Home Monitor/Group Home Lic. Specialist	Kimberly Ivey	(786) 330-0368	kimberly.ivey@apdcares.org
Group Home Monitor/Group Home Lic. Specialist	Michelle Bosch	(786) 459-9542	michelle.bosch@apdcares.org
Group Home Monitor/Group Home Lic. Specialist	Yolaimy Quintana	(786) 417-4836	yolaimy.quintana@apdcares.org
Residential Licensing Specialist	Nikeycia Levy	(305) 377-5059	nikeycia.levy@apdcares.org

July 1, 2026

Authorization Review Guide

As we begin the 2026–2027 Fiscal Year (FY), it is essential for Service Providers to review and confirm the accuracy of their authorizations in iConnect. A thorough review helps prevent billing discrepancies, ensures compliance with service requirements, and supports smooth service delivery throughout the year.

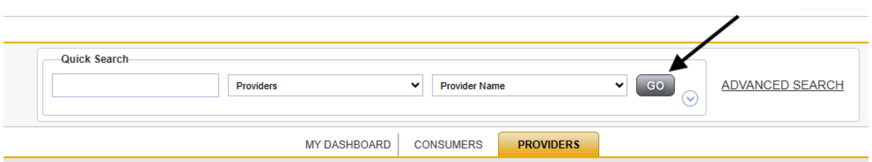
This guide provides a clear, step-by-step process to help you efficiently locate and validate authorization details.

When reviewing authorizations, remember to open each one fully to verify the following:

1. Authorization Dates
2. The Service
3. The Number of Units Authorized
4. Authorization Status
5. Comments from the Waiver Support Coordinator (WSC)

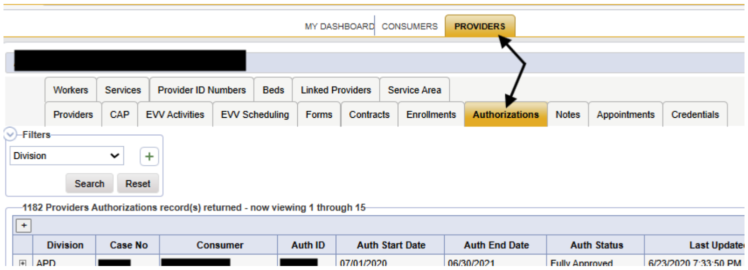
Locating the Authorization in iConnect:

1. After logging into iConnect, navigate to your Provider Corporate (parent) record utilizing the Quick Search.

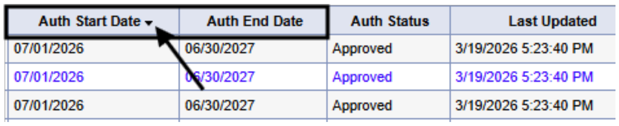


Note: The Authorizations are also located in the Consumer's record in the "Auths" tab.

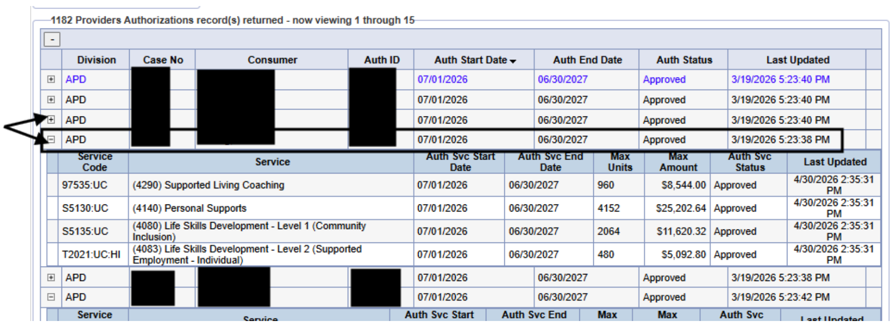
2. You will land on your Providers tab. Click the **Authorizations** tab to view your complete list of authorizations.



3. Utilize the filters or click on the headers in the list view grid to sort your authorizations.

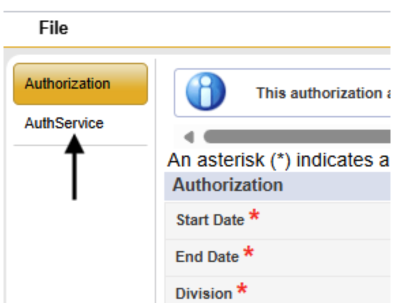


4. Click anywhere on the client's row to open the client record and view the authorization details.

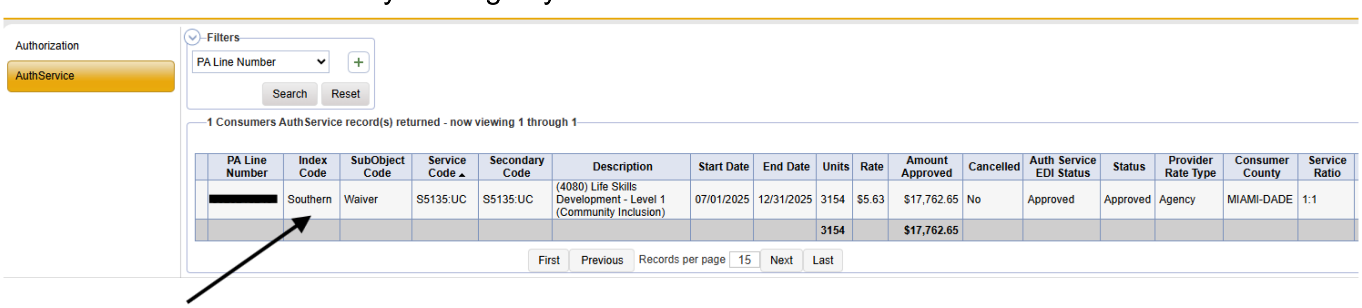


Pro Tip: If a plus sign (+) appears, clicking it will expand all authorizations for that client.

5. Once the record is open, navigate to the **AuthService** bookmark to view the authorization(s).



6. Select the authorization by clicking anywhere on the row.



An asterisk (*) indicates a required field

Authorized Service				
PA Line Number	5025218249			
Start Date *	07/01/2025			
End Date *	12/31/2025			
Index/SubObject *	Index / SubObject			
	IndexCode	Index Description	SubObject	SubO
	Southern	Southern Region	Waiver	iBudget Waiver
Service Code *	S5135:UC			
Secondary Code	S5135:UC			
Service Description	(4080) Life Skills Development - Level 1 (Community Inclusion)			
Unit Type *	15 mins			
Units Per	120.00			
Units of Measure	Week			
Max. Units *	3154			
Rate *	$5.63			
Amount Approved *	$17,762.65			

Reviewing Key Authorization Elements

A. Start Date/End Date

Confirm that the authorization period is correct for the requested dates.

1. Start Date = should reflect the beginning of the service, typically the beginning of the FY
2. End Date = usually it will be for the end of the current FY unless other circumstances apply (Below is an example of an end date prior to the end of the FY.)

An asterisk (*) indicates a required field

Authorized Service	
PA Line Number	[redacted]
Start Date *	07/01/2025
End Date *	12/31/2025

B. Service Code and Service Description

Verify that the service detail correctly represents the service being rendered.

1. Service Code = must match the service being delivered
2. Service Description = should accurately reflect the Service Code

Service Code *	S5135:UC
Secondary Code	S5135:UC
Service Description	(4080) Life Skills Development - Level 1 (Community Inclusion)

C. Units

Review all unit-related fields for accuracy:

1. Unit Type:

Defines how service will be measured. Units will be calculated based on the Units Per

   a. 15 minutes (4 Units x 15 minutes = 1 hour of service)
   b. Day
   c. Hour
   d. Item
   e. Mile
   f. Month
   g. Trip
   h. Units (examples are: (re)evaluation, plan of care, equipment, installation, personal care items, or assessment)

2. Units Per: The number of units based on the Units of Measure

3. Units of Measure: Is a calendar increment. How the units will be calculated:
    a. Business Day
    b. Calendar Day
    c. Week
    d. Month - Round Up
    e. Quarter
4. Max Units: The total number of units for the full-service period.

Start Date *	07/01/2026
End Date *	06/30/2027
Index/SubObject *	Index / SubObject: IndexCode: Southern; Index Description: Southern Region; SubObject: Waiver
Service Code *	97535:UC
Secondary Code	97535:UC
Service Description	(4290) Supported Living Coaching
Unit Type *	15 mins
Units Per	60.00
Units of Measure	Month - Round Up
Max. Units *	720
Rate *	$8.90
Amount Approved *	$6,408.00

Example: The above shows a full year of service with a Unit Type of "15 mins," using 60 units per month.

60 units per month x 12 (12 months in a year) = 720 units for the full authorization.

D. Authorization Status

Confirm the authorization shows one of the valid approval statuses:

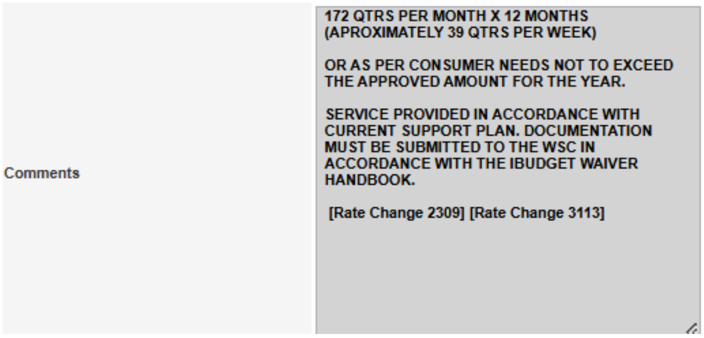
1. Fully Approved
2. Approved
3. Partially Approved
4. Terminated
5. Rejected - ***Reach out to the client's WSC if you have a Rejected authorization.***

Auth Status
Fully Approved
Fully Approved
Fully Approved
Fully Approved
Fully Approved
Fully Approved
Terminated
Fully Approved
Fully Approved
Fully Approved
Terminated
Fully Approved
Fully Approved
Fully Approved
Rejected

E. Comments

The WSC should include details supporting service delivery. This can include:

1. Flexibility based on the client's needs without exceeding the approved amount for the FY.
2. Service delivery consistent with the current support plan.
3. Documentation requirements per the iBudget Waiver Handbook.
4. Notes on the expected service delivery, such as days of the week or amount of units per month.



Comments	172 QTRS PER MONTH X 12 MONTHS (APROXIMATELY 39 QTRS PER WEEK) OR AS PER CONSUMER NEEDS NOT TO EXCEED THE APPROVED AMOUNT FOR THE YEAR. SERVICE PROVIDED IN ACCORDANCE WITH CURRENT SUPPORT PLAN. DOCUMENTATION MUST BE SUBMITTED TO THE WSC IN ACCORDANCE WITH THE IBUDGET WAIVER HANDBOOK. [Rate Change 2309] [Rate Change 3113]

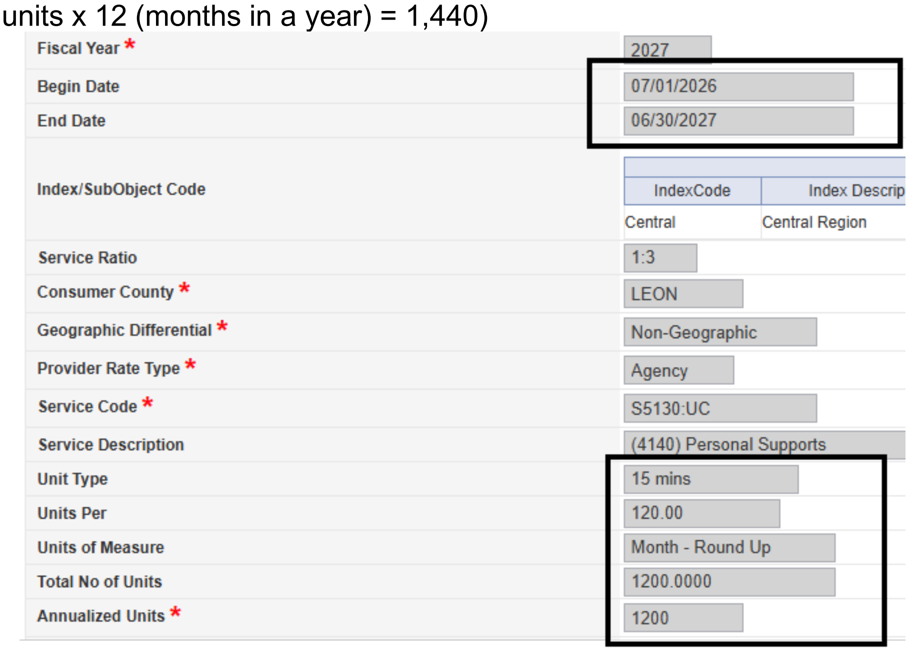
F. Discrepancies

If any discrepancies are discovered during your review, reach out to the WSC to remediate those issues. Below are some common discrepancies:

1. The Units and Units per do not equal the Max Amount.

In the example below, the **Units Per** = "120.00" and the **Units of Measure** = "Month – Round Up" and the authorization is for the full FY. The total amount of units should be 1440; however, the example below shows 1200.

(120 units x 12 (months in a year) = 1,440)



Fiscal Year *	2027
Begin Date	07/01/2026
End Date	06/30/2027
Index/SubObject Code	IndexCode: Central / Index Descrip: Central Region
Service Ratio	1:3
Consumer County *	LEON
Geographic Differential *	Non-Geographic
Provider Rate Type *	Agency
Service Code *	S5130:UC
Service Description	(4140) Personal Supports
Unit Type	15 mins
Units Per	120.00
Units of Measure	Month - Round Up
Total No of Units	1200.0000
Annualized Units *	1200

2. The comments from the WSC do not match the approved authorization. In the example below, the authorization was approved for 1440 units for the full authorization with a **Unit Type** = "15 mins". The comments from the WSC state that the authorization is for 5 days per week, 10 hours per day.

To figure out how many are being used in the comments, we will need to convert the hours to units.

1 hour = 4 units (There are four 15-minute increments in an hour).

4 units x 10 hours a day = 40 units a day

40 units a day x 5 days a week = 200 units a week

200 units a week x 52 weeks in a year = 10,400 units for the year

The authorization is approved for a total of 1440 units for the year. In this instance, I will need to reach out to the WSC to remediate this discrepancy.

Unit Type	15 mins
Units Per	120.00
Units of Measure	Month - Round Up
Total No of Units	1440
Annualized Units *	1440
Provider ID *	[redacted] Details
Provider	[redacted]
Rate	$4.15
Max Amount *	$4,980.00
Amount Requested	
Authorization Notes/Comments *	**Monday through Friday - 10 hours a day.**

August 1, 2026

Provider Training Unit (PTU)

Your iConnect trainers have a new name to showcase everything that they do to help you, our providers. We are excited to introduce the **Provider Training Unit** (PTU). Each member of this group is now a **Provider Trainer** dedicated to helping you navigate our tools, resources, and processes with confidence.

Examples of the PTU and the Provider Trainers' Functions

1. **iConnect Trainings**

   Your Provider Trainers offer a variety of Supplementary iConnect training sessions to help you understand and learn different workflows of iConnect through:

   a. Live in-person training
   b. Live webinars
   c. Creating the self-paced iConnect training course modules for TRAIN Florida

   To sign up for an iConnect training, log in to your TRAIN Florida account.

2. **Technical Assistance**

   Your Provider Trainers offer technical assistance for iConnect-related questions or needs. They also attend meetings to report any changes and/or additions to iConnect. Below are some examples of what technical assistance may look like.

   a. One-on-one provider support for:
      i. iConnect-related questions
         1. "Is this authorization correct?"
         2. "Is this the correct TRAIN FL course?"
      ii. iConnect-related issues
         1. Assigning a Billing Agent
         2. Removing a Worker from iConnect
   b. Attending quarterly meetings to showcase updates or new features of iConnect:
      i. WSC meetings
      ii. Provider meetings
      iii. Other meetings based on the determined need

c. When questions or issues fall outside their area of access, Provider Trainers will ensure you are referred to the correct resource.

For example:

i. Questions regarding ID PASS
ii. Log in/Password issues
iii. Billing

3. **Variety of Pre-Service Trainings**

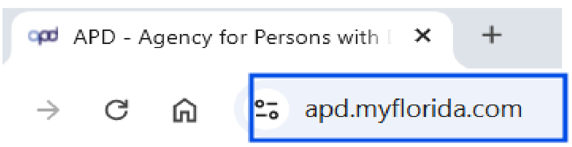
Your Provider Trainers offer more than iConnect courses. For example:

a. Social Security Works Incentive (SSWI)
b. Supported Employment Best Practices
c. Supported Living Pre-Service

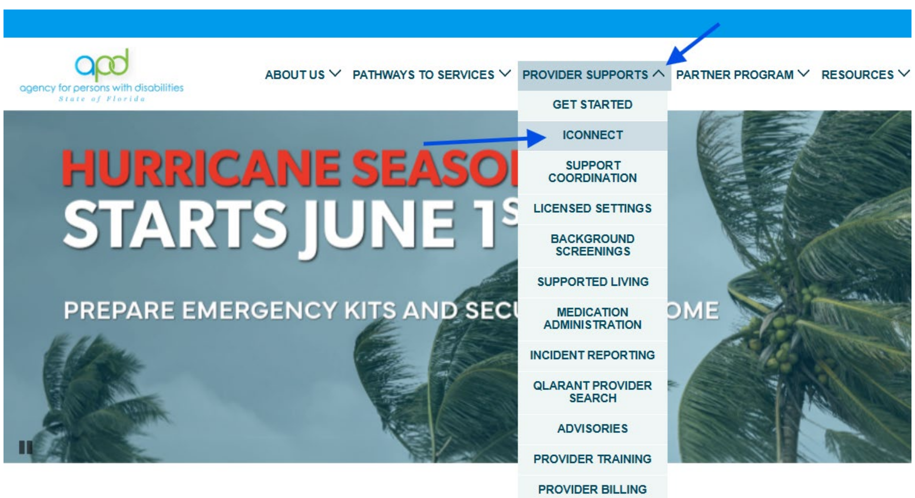
Locate your Regional Provider Trainer

It is easy to find your Region's Provider Trainer.

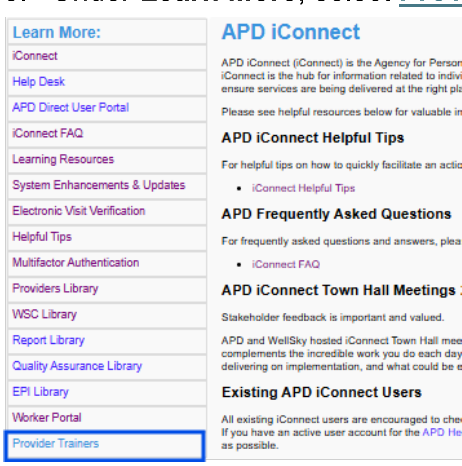
1. Log in to APD's website.



2. Go to **Provider Supports**, click on **iConnect**.



3. Under **Learn More**, select **Provider Trainers**.



If your region currently does not have a Provider Trainer, you can email iConnect@apdcares.org or contact another region's trainer with iConnect-related questions.

September 1, 2026

Locating Ratios on Service Authorizations

Introduction:

Some services contain ratios in the authorization. Ratios are important for many reasons; service ratios define the maximum number of clients a provider can serve simultaneously under a given authorization, and they are essential for accurate billing, compliance, and service delivery**.**

Providers must have access to their client's service authorizations as outlined in the recent Provider Advisory #2026-016 and Chapter 3 of the APD iBudget Waiver Handbook.

How it works in billing and service delivery:

- A provider may serve a client that has multiple authorizations for the same service but with different ratios. Each ratio will have its own Prior Authorization (PA) number and will need to be billed and documented separately.

    Note: Separate Life Skills Development 1 (Companion Services) ratios cannot be billed during the same timeframes.

- The ratio is determined by the client's needs as it pertains to their health and safety as outlined in the iBudget Handbook. Ratios include:
    1. 1:1
    2. 1:2
    3. 1:3
    4. 1:5
    5. 1:6 – 1:8
    6. 1:6 – 1:10
- Ratios can be at different time intervals depending on the service.
    1. **Quarter-hourly**
    2. **Hourly**
    3. **Day**
    4. **Monthly**
- Access the **Florida Medical Developmental Disabilities Individual Budgeting Waiver Services Provider Rate Table** for a complete guide for each service with all ratios and limitations.

Why it matters:

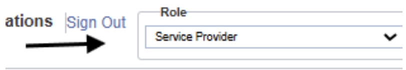
- **Billing:** Providers must bill according to the ratio authorized for each service delivery.
- **Compliance:** Using the wrong ratio can result in underpayment/overpayment or rejected billing.
- **Flexibility:** Providers can change ratios during the day, but each change requires a new service delivery record.
- **Staffing:** Providers need to staff according to the ratio that meets the client's needs and APD requirements.

Find the ratios within the Service Authorizations

There are two ways to locate the service ratios.

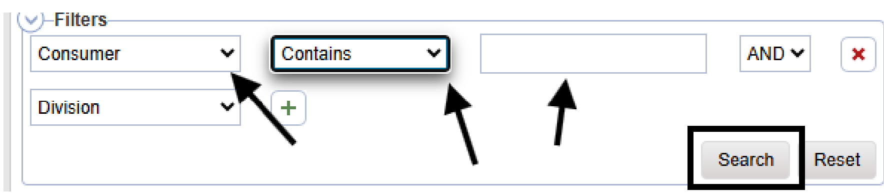
A. From the Provider Chapter:

1. Log in to iConnect using your Service Provider role.



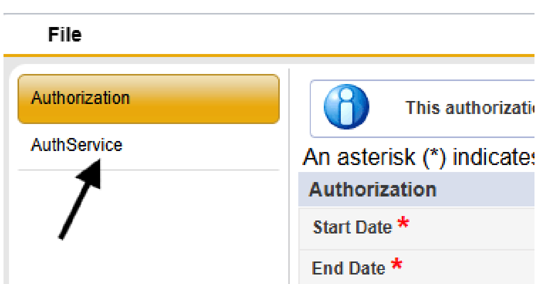
2. Click on the **Authorizations** tab.

3. Use the filters to update your search criteria. Click **Search**.

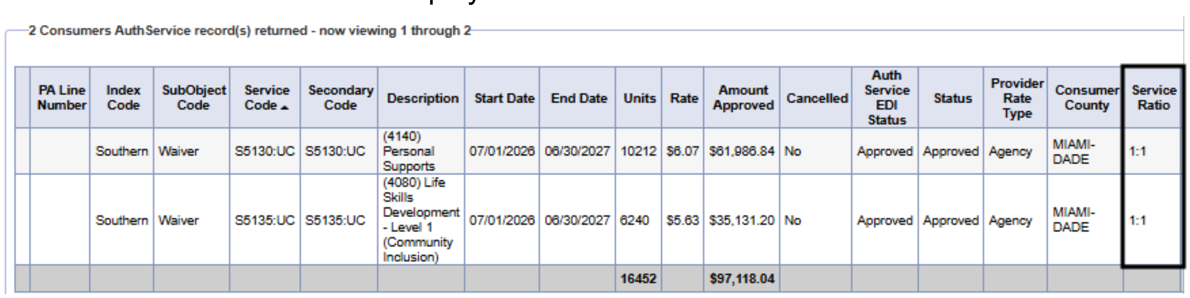


4. Click the authorization from the list view grid.

5. Click on the **AuthService** bookmark.



6. Additional information will display. The Service Ratio will be located at the end of the row.

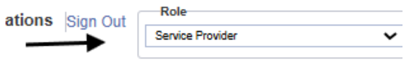


2 Consumers AuthService record(s) returned - now viewing 1 through 2

	PA Line Number	Index Code	SubObject Code	Service Code	Secondary Code	Description	Start Date	End Date	Units	Rate	Amount Approved	Cancelled	Auth Service EDI Status	Status	Provider Rate Type	Consumer County	Service Ratio
		Southern	Waiver	S5130:UC	S5130:UC	(4140) Personal Supports	07/01/2026	06/30/2027	10212	$6.07	$61,986.84	No	Approved	Approved	Agency	MIAMI-DADE	1:1
		Southern	Waiver	S5135:UC	S5135:UC	(4080) Life Skills Development - Level 1 (Community Inclusion)	07/01/2026	06/30/2027	6240	$5.63	$35,131.20	No	Approved	Approved	Agency	MIAMI-DADE	1:1
									16452		$97,118.04						

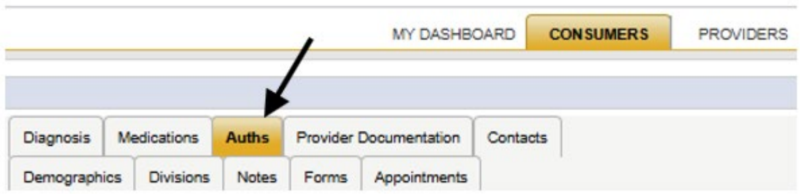
B. From the Consumers Record:

1. Log in to iConnect using your Service Provider role.

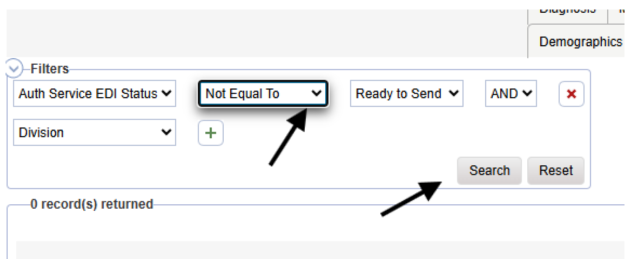


2. Utilize the Quick Search and locate the Consumer record.

3. Click on the **Auths** tab.

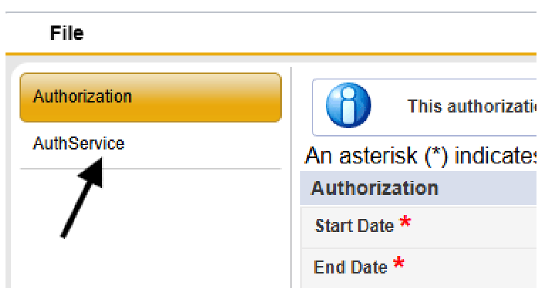


4. Utilize the Filters to locate the authorization.



5. Click the authorization from the list view grid.

6. Click on the **AuthService** bookmark.



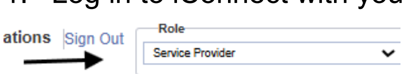
7. The service ratio will be located at the end of the row.

Service Code	Service	Start Date	Unit Type	End Date	Auth Service EDI Status	Max Units	Status	Rate	Amount Approved	Cancelled	Provider Rate Type	Consumer County	Service Ratio
S5102:UC	(4082) Life Skills Development - Level 3 (ADT) - Facility Based	07/01/2026	Hour	06/30/2027	Approved	936	Approved	$6.70	$6,271.20	No	Agency	BAY	1:10

Printing Authorizations:

If you would like to print an authorization for your records, you can do so by clicking on **File** from the open record.

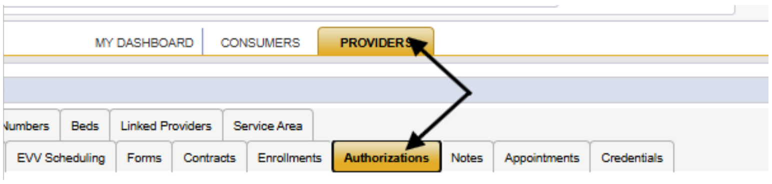
1. Log in to iConnect with your Service Provider role.



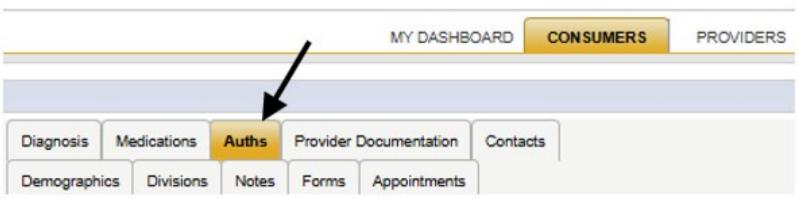
2. Utilize the Quick Search to locate the record.

3. Click on the **Authorizations** tab if in the Providers Record or click the **Auths** tab if in the Consumer record.

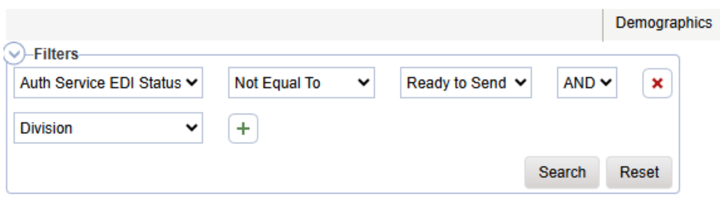
Providers Record:



Consumer Record:

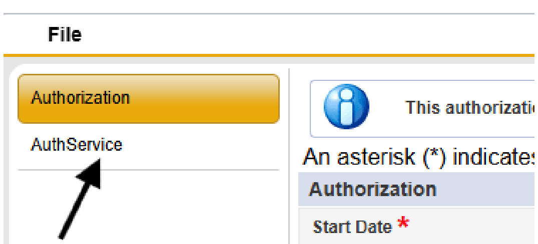


4. Utilize the Filters to locate the authorization.



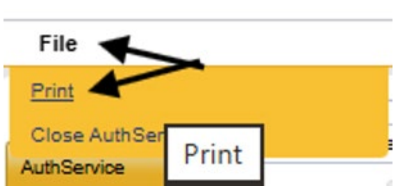
5. Click the authorization that you want to print.

6. Click on the **AuthService** bookmark.

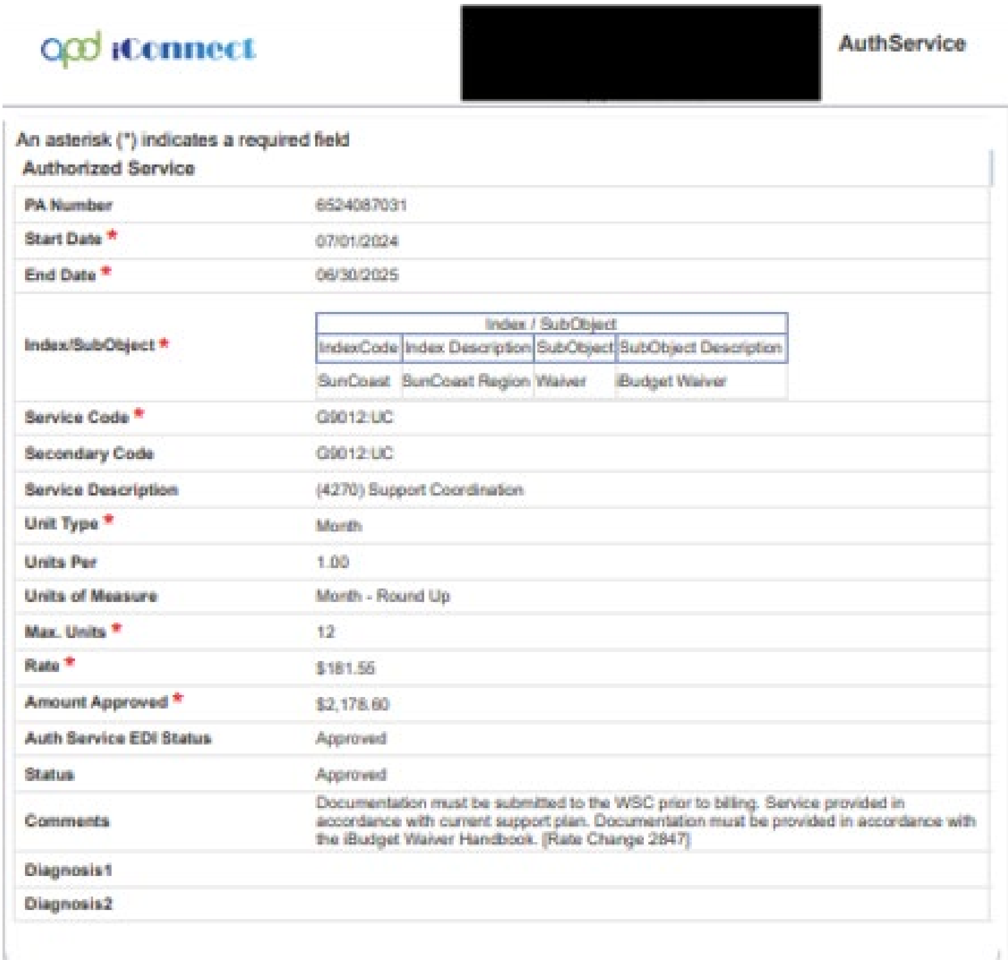


7. Click on the AuthService record from the list view grid.

8. Click **File > Print.**



9. Here is an example of the authorization in the print view.



apd iConnect [redacted] AuthService

An asterisk (*) indicates a required field

Authorized Service

PA Number	6524087031
Start Date *	07/01/2024
End Date *	06/30/2025
Index/SubObject *	Index / SubObject IndexCode | Index Description | SubObject | SubObject Description SunCoast | SunCoast Region | Waiver | iBudget Waiver
Service Code *	G9012:UC
Secondary Code	G9012:UC
Service Description	(4270) Support Coordination
Unit Type *	Month
Units Per	1.00
Units of Measure	Month - Round Up
Max. Units *	12
Rate *	$181.55
Amount Approved *	$2,178.60
Auth Service EDI Status	Approved
Status	Approved
Comments	Documentation must be submitted to the WSC prior to billing. Service provided in accordance with current support plan. Documentation must be provided in accordance with the iBudget Waiver Handbook. [Rate Change 2847]
Diagnosis1	
Diagnosis2	

10. Select your printer or save to your device as a PDF.