

Updating Worker's Information in the Provider Record

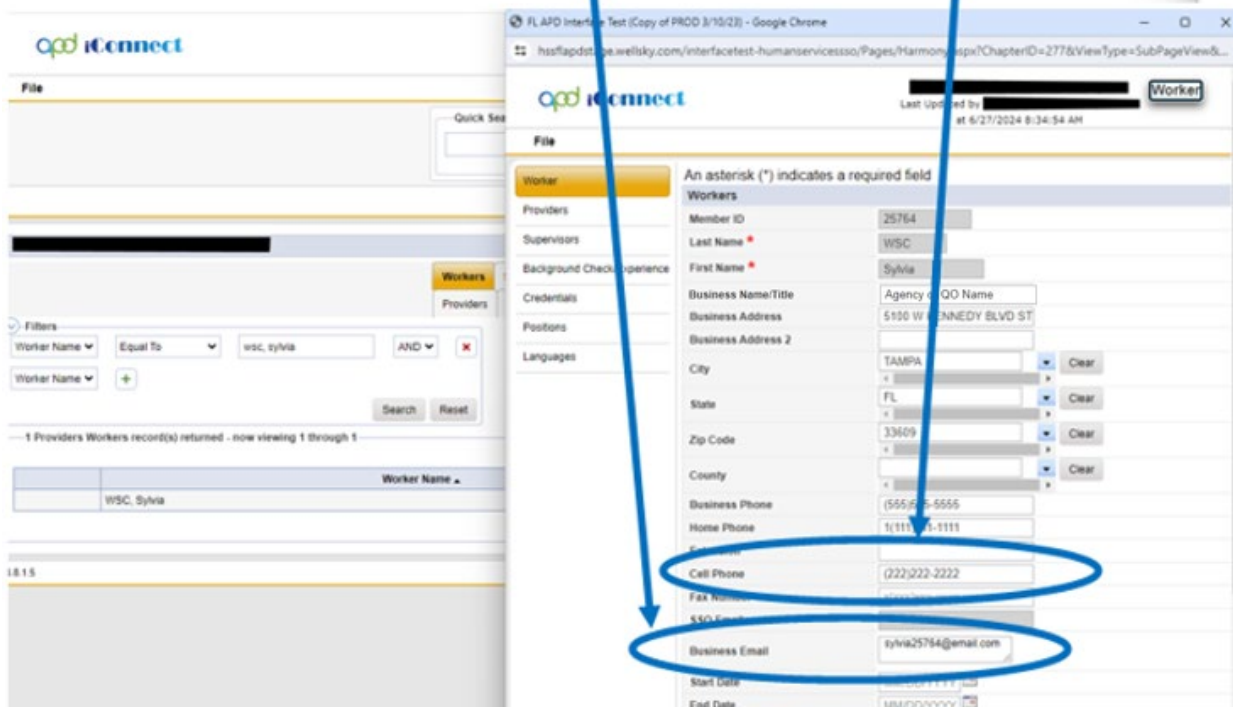
Introduction

Agency and Qualified Organization (QO) Owners are assigned the Service Provider role in iConnect. The Service Provider role can also be assigned to other qualified employees through ID PASS. For more information on how to set up or revise an ID PASS account review the [Step-by-Step – ID PASS](#) Job Aid.

The Workers tab in the Provider's record will contain the names of the workers that have successfully completed the ID PASS process for the Agency or QO that they are employed. iConnect has functionalities that allow information that the Service Provider puts into their employee's record in the Workers tab, to be imported into other forms and reports. For example, the phone number and email of the Waiver Support Coordinator (WSC) can be imported into the Person-Centered Support Plan (PCSP). This will happen if the WSC's information was placed accurately into the Workers tab by the Service Provider. Below is a screenshot of the PCSP and the employee's worker record.

My Waiver Support Coordinator

Name	Agency (if applicable)	Email	Phone Number(s)
WSC, Sylvia	[REDACTED]	sylvia25764@email.com	(222)222-2222



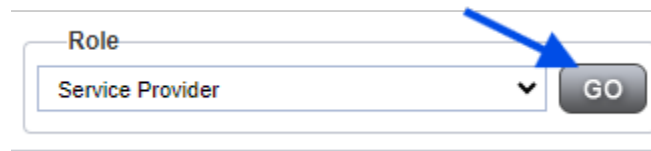
The screenshot shows the iConnect interface for a worker record. The 'Workers' tab is active, and the record for Sylvia WSC is displayed. The following information is visible in the worker record form:

- Member ID: 25764
- Last Name: WSC
- First Name: Sylvia
- Business Name/Title: Agency QO Name
- Business Address: 5100 W KENNEDY BLVD ST
- City: TAMPA
- State: FL
- Zip Code: 33609
- County: [REDACTED]
- Business Phone: (555) 555-5555
- Home Phone: (111) 1-1111
- Cell Phone: (222) 222-2222
- Business Email: sylvia25764@email.com

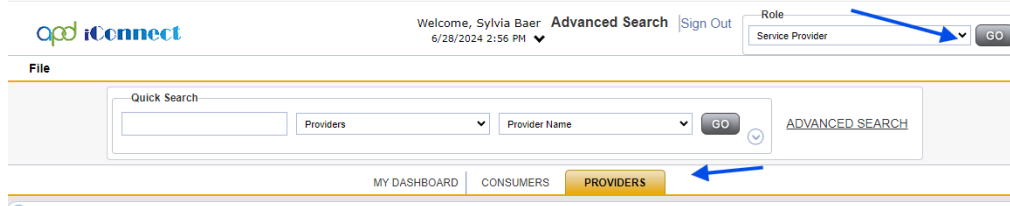
Blue arrows and circles in the image highlight the 'Cell Phone' and 'Business Email' fields, showing their correspondence to the data in the 'My Waiver Support Coordinator' table.

Steps on Updating the Worker's Record in iConnect

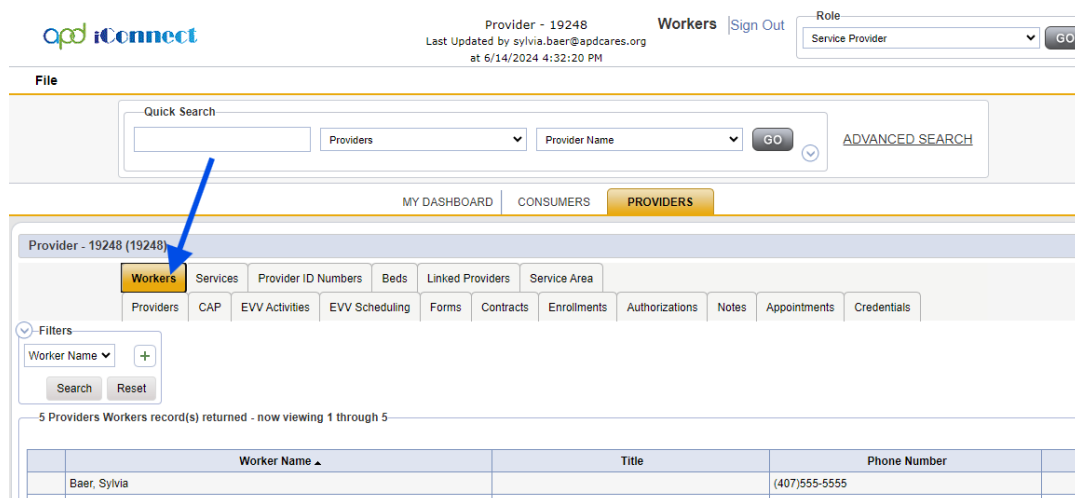
1. To begin, log into iConnect and set Role = **Service Provider**. Click **Go**.



2. Navigate to the Provider's Record in the Quick Search filter and click **GO**.



3. Navigate to the Workers tab.

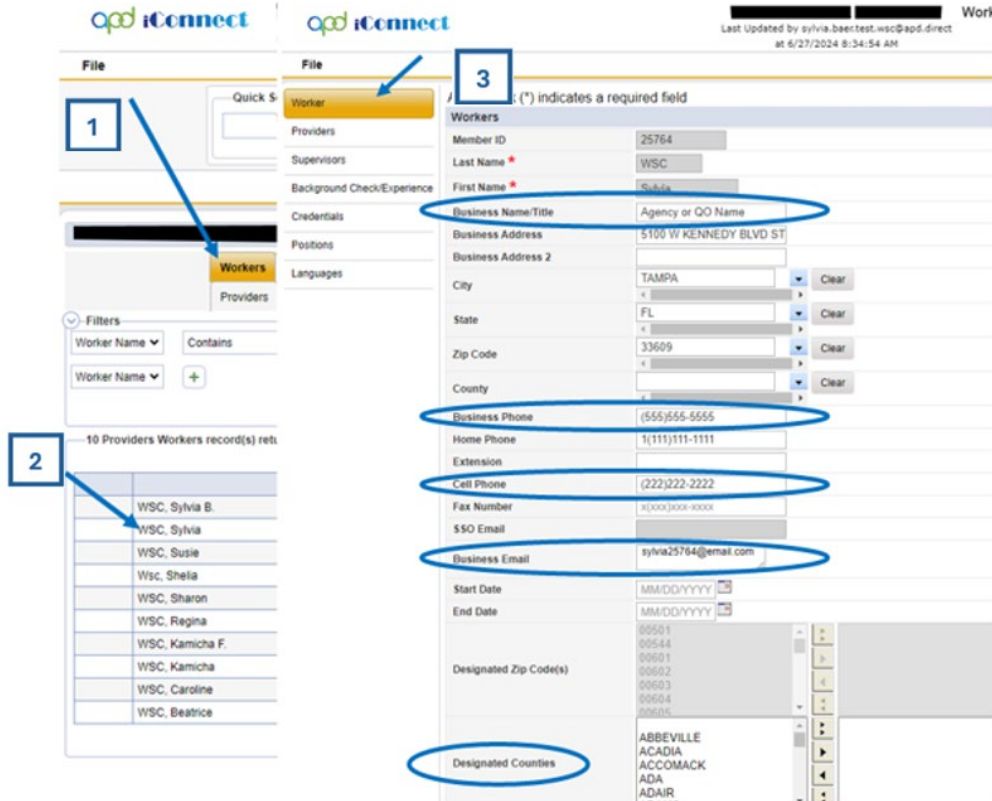


Worker Name	Title	Phone Number
Baer, Sylvia		(407)555-5555

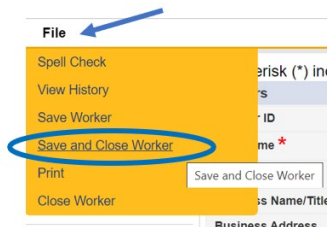
4. Click the worker's name from the list view grid. The Workers Detail screen will display. Fill out the information as needed.
 - a. Business Name/Title: the name of the agency or QO
 - b. Business Phone: this information will be visible in the Details of the Division tab in the client's record.
 - c. Cell Phone: this information will be pulled into the appropriate forms
 - d. Business Email: this information will be visible in the Details of the Division tab in the client's record and pulled into the appropriate forms
 - e. Start Date: as applicable
 - f. End Date: as needed
 - g. Designated Counties: as applicable for WSCs
 - h. Exclude: only check if the worker needs to be removed from the Worker's tab. This could be utilized if there are multiple entries, or the worker no

longer works for the agency/QO. If the worker no longer works for the agency/QO, be sure to deactivate the worker from the Clearinghouse and iConnect. [Utilize the Deactivating a Worker Record Job Aid for further guidance.](#)

- i. Once completed, navigate to **File** and select **Save and Close Worker**.

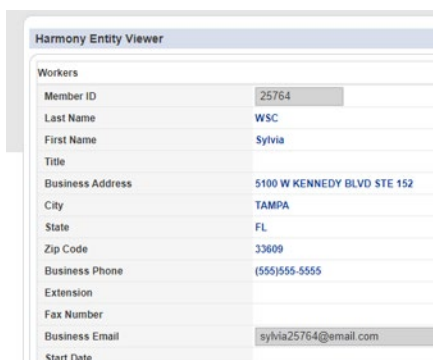


The screenshot shows the iConnect interface. On the left, a sidebar contains a 'Workers' tab highlighted with a blue box labeled '1'. Below it, a list of workers is shown, with a blue box labeled '2' highlighting the list. The main area displays the details for a selected worker, including fields for Member ID, Last Name, First Name, Business Name/Title, Business Address, City, State, Zip Code, County, Business Phone, Home Phone, Extension, Cell Phone, Fax Number, SSO Email, Business Email, Start Date, End Date, Designated Zip Code(s), and Designated Counties. Several fields are circled in blue, indicating required or important information.



The screenshot shows the 'File' menu in iConnect. The menu items are: Spell Check, View History, Save Worker, Save and Close Worker (circled in blue), Print, and Close Worker. A blue arrow points to the 'File' menu header.

An example of the information from the Details of the Division tab in the client's record.



The screenshot shows the 'Harmony Entity Viewer' for a worker. The details are as follows:

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	(555)555-5555
Extension	
Fax Number	
Business Email	sylvia25764@email.com
Start Date	