WSC Caseload Report

Introduction

Waiver Support Coordinators (WSCs) are responsible for maintaining their clients' demographics and legal representative information in iConnect. The WSC Caseload Report will allow WSCs and Qualified Organization (QO) owners to generate a report of their caseloads within iConnect. The WSC Caseload Report will include clients' demographic information, including their legal representative, if applicable. The report can be utilized to identify any updates needed to either the client's demographic information in iConnect or their legal representative information as applicable.

***IMPORTANT:* Contacts with the Legal Representative as their Primary Relationship will automatically be imported on the client's Person-Centered Support Plan, hearing notices and other forms and documents within iConnect.**

The WSC Caseload Report will display the client's information for the WSC that is listed as the Primary Worker under the client in the Division tab of the consumer record. If edits are needed to the Division tab, please reach out to the Regional Waiver Liaison.

The WSC Caseload Report will display the Primary Worker Name along with their Member ID number. The Member ID number is a unique number associated with the listed Primary Worker.

***REMINDER:* Personal Health Information (PHI) will be pulled when exporting this report. It is the responsibility of all iConnect users that their systems follow all HIPAA requirements.**

The following iConnect Roles will have access to this report:
APD Admin
APD Main
Region QA Workstream Lead
Region QA Workstream Worker
Region Waiver Workstream Lead
ROM/Deputy ROM
Service Provider
State Office Process Owner
State Office Worker
Tier 1 Help Desk
Tier 2 Help Desk
WSC/CDC

It is important to distinguish what the different roles can retrieve within the report.

- The Service Provider role has access to pull the report to view the

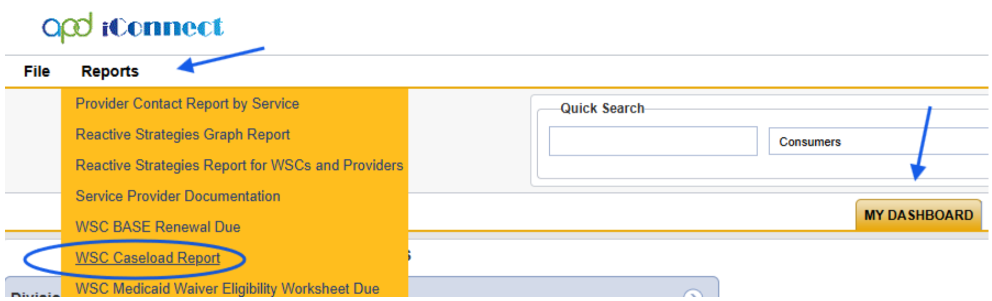
Caseload of all the WSCs within their QO.

- The WSC/CDC role has access to pull the report to view only the Caseload they are assigned to as the Primary Worker.
- APD roles will have access to pull a report for all QOs and WSCs within iConnect.

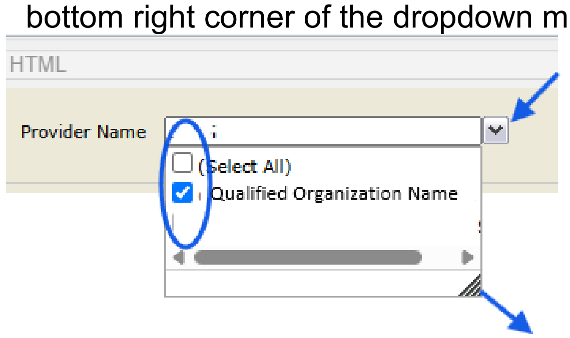
Pulling the WSC Caseload Report

1. To begin, log into iConnect and set Role = **<u>WSC/CDC</u>**, **<u>Service Provider</u>** or appropriate APD Staff Role. Click **Go**.

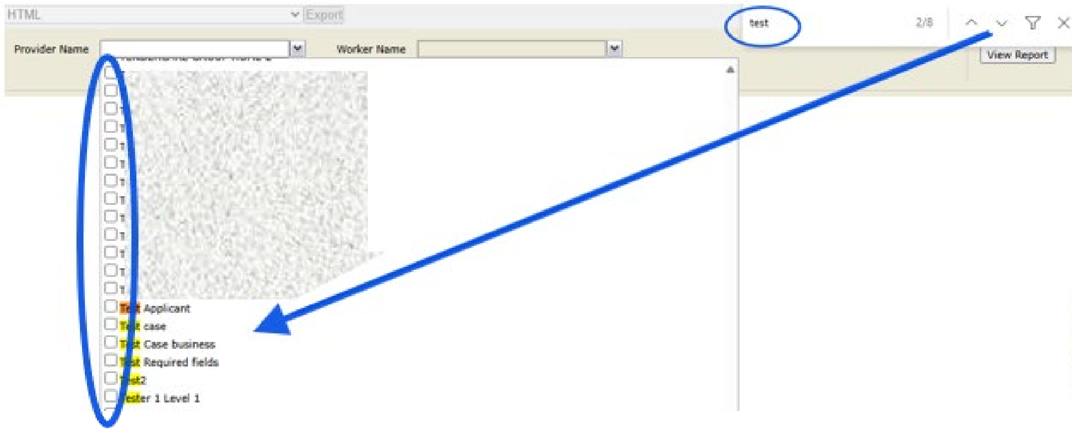
2. On **My Dashboard,** navigate to the **Reports** menu dropdown and select **WSC Caseload Report.**



3. A new window opens with the available search criteria. Fill out the search criteria.
   a. In the Provider Name dropdown, select the name(s) needed. The WSC/CDC role and the Service Provider role will only have access to their QO.
      i. To expand the box to view additional providers, click and drag the bottom right corner of the dropdown menu.

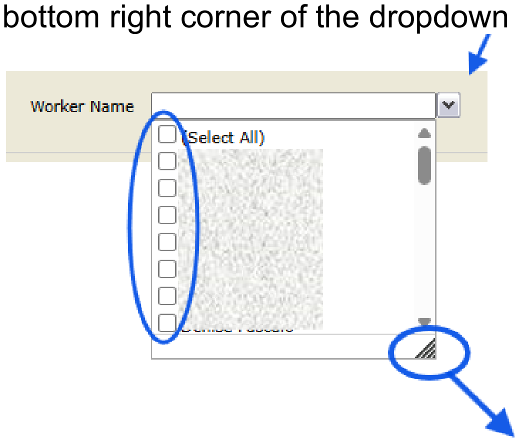


      ii. On the keyboard, press **Ctrl + F**, and type in the name of the QO. Utilized the arrows to locate multiple QOs with similar name.



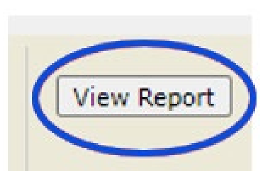
b. In the Worker Name dropdown, select the name(s) needed. WSC/CDC role will only have access to their name and the Service Provider role will have access to all WSCs in their QO.

   i. To expand the box to view additional WSC names, click and drag the bottom right corner of the dropdown menu.



   ii. On the keyboard, press **Ctrl + F**, and type in the name(s) of the WSC(s). Utilized the arrows to locate multiple WSCs with similar names.

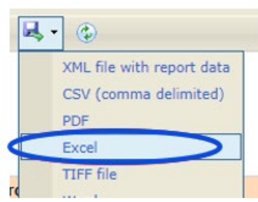
4. Click **View Report** to execute the search.



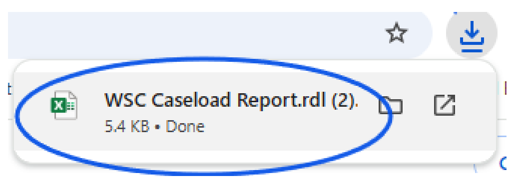
5. A report will generate. The report can be viewed on the screen or exported.

6. To export the report, go to the caret next to the Save icon.

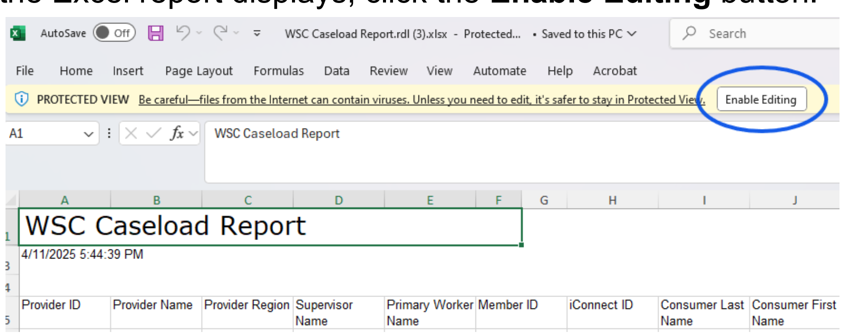
   a. Select **Excel**.



   b. The Excel report will download. Click the report from the computer's downloads.



   c. Once the Excel report displays, click the **Enable Editing** button.



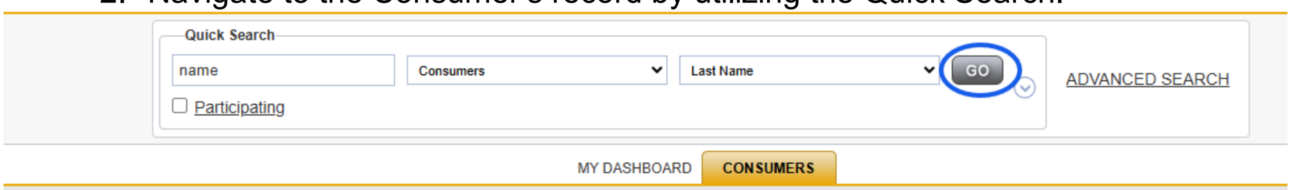
7. Review/filter report as needed. Utilize the How to Add Filters to iConnect Reports Job Aid for additional assistance in filtering an iConnect report.

As Needed: Previously Deactivated Legal Representative is Displayed on WSC Caseload Report

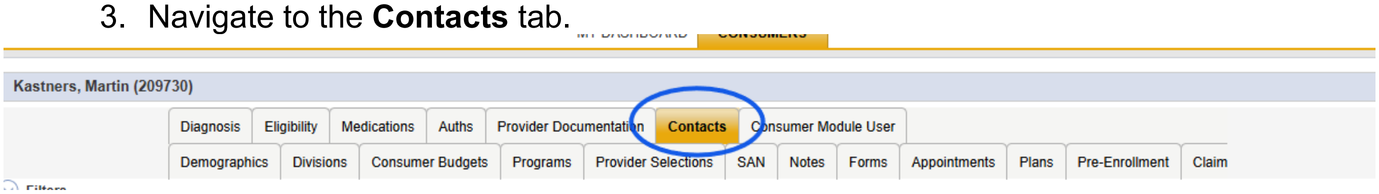
If a WSC runs the WSC Caseload Report and it is identified that a previously deactivated legal representative is listed on the report, that means the primary relationship for that contact states “Legal Representative.” The following instructions will assist in how to locate and update that contact record in iConnect.

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

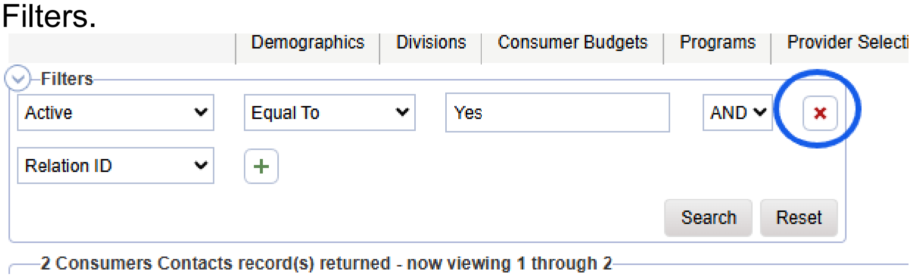
2. Navigate to the Consumer’s record by utilizing the Quick Search.



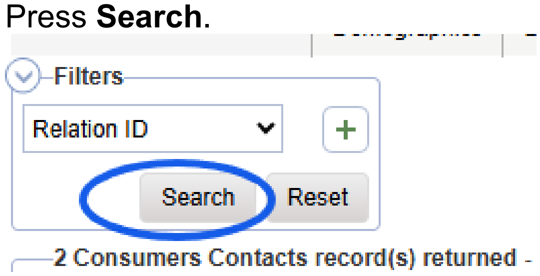
3. Navigate to the **Contacts** tab.



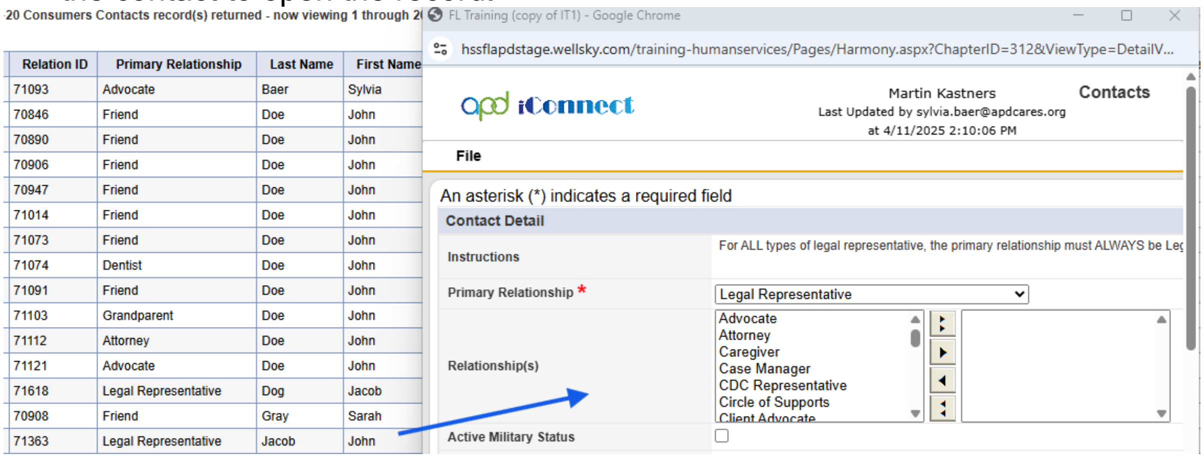
4. The Contacts tab has automatic filters to allow the user to only view the Active contacts listed. To change the filters to view all contacts, click the red X next to Filters.



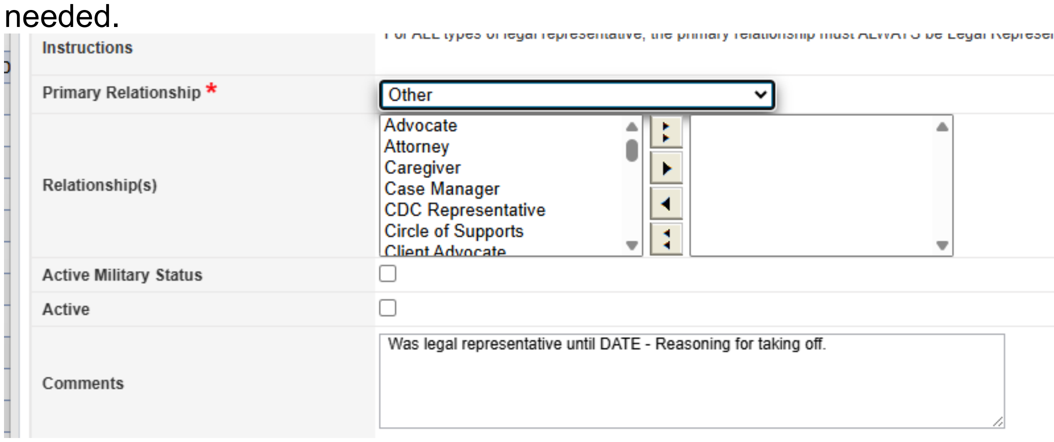
5. Press **Search**.



6. Locate the contact that needs to be updated from the list view grid and click on the contact to open the record.



7. Once opened, change the Primary Relationship to a secondary relationship or “Other” if no other secondary relationship matches. Then write a comments as needed.



8. When finished, navigate to File > Save and Close Contacts.