Pulling WSC Provider Documentation Report – WSC/CDC Role

Introduction

Waiver Support Coordinators (WSCs) and Consumer Directed Care Plus (CDC+) Consultants are employed by a Qualified Organization (QO) and are assigned the WSC/CDC role in iConnect. WSCs and CDC+ Consultants can pull a report to view the Provider Documentation completed by service providers for the clients on their caseload. The WSC Provider Documentation report will show all documentation entered in iConnect for their clients to assist the WSC in monitoring the services for their clients.

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

Please refer to the [Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook](#) for specific documentation requirements. Services provided after the implementation of iConnect must be added to iConnect prior to billing.

Pulling the WSC Provider Documentation Report

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


2. On **My Dashboard**, navigate to the **Reports** menu and select **WSC Provider Documentation.**
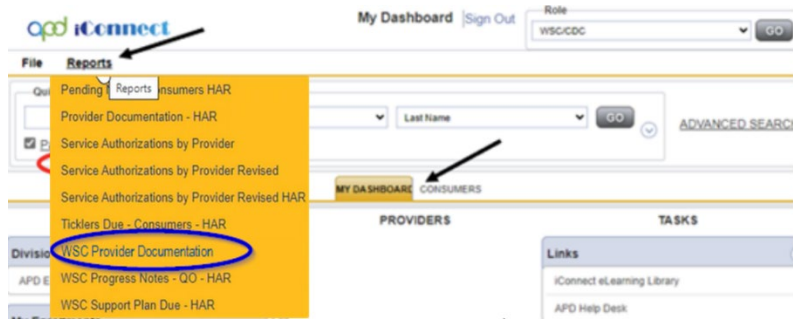
3. Fill out the search screen with the needed information for the report. **It is crucial that the information is filled out in a specific order to allow the report to be pulled.**

   a. Begin Date: Use the start date of the report criteria needed. A date must be selected by clicking on the appropriate date located in the calendar icon. Select the month and year by clicking on the corresponding drop-down menus, and then select the date by clicking on it.
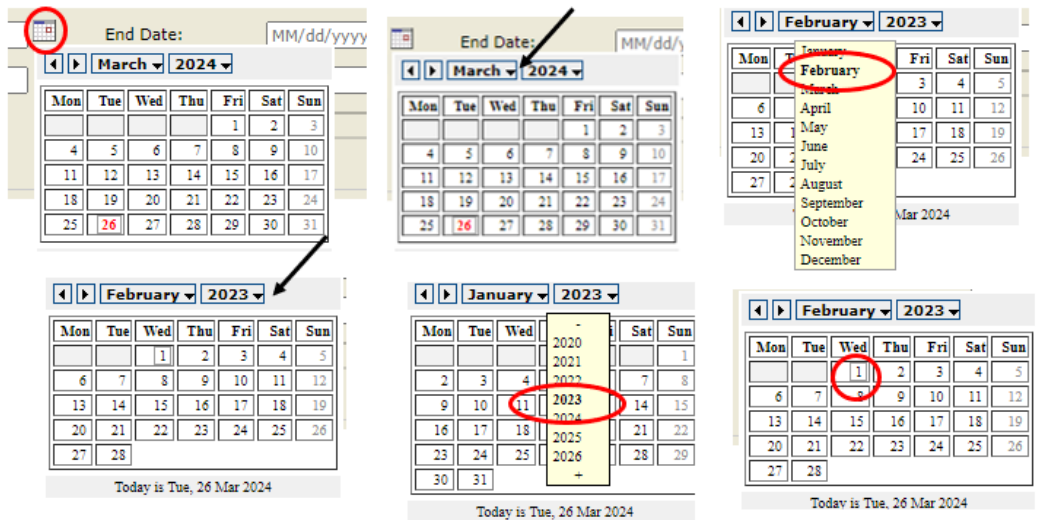

   b. End Date: Use the end date of the report criteria needed. A date must be selected by clicking on the appropriate date located in the calendar icon. Select the month and year by clicking on the corresponding drop-down menus, and then select the date by clicking on it.
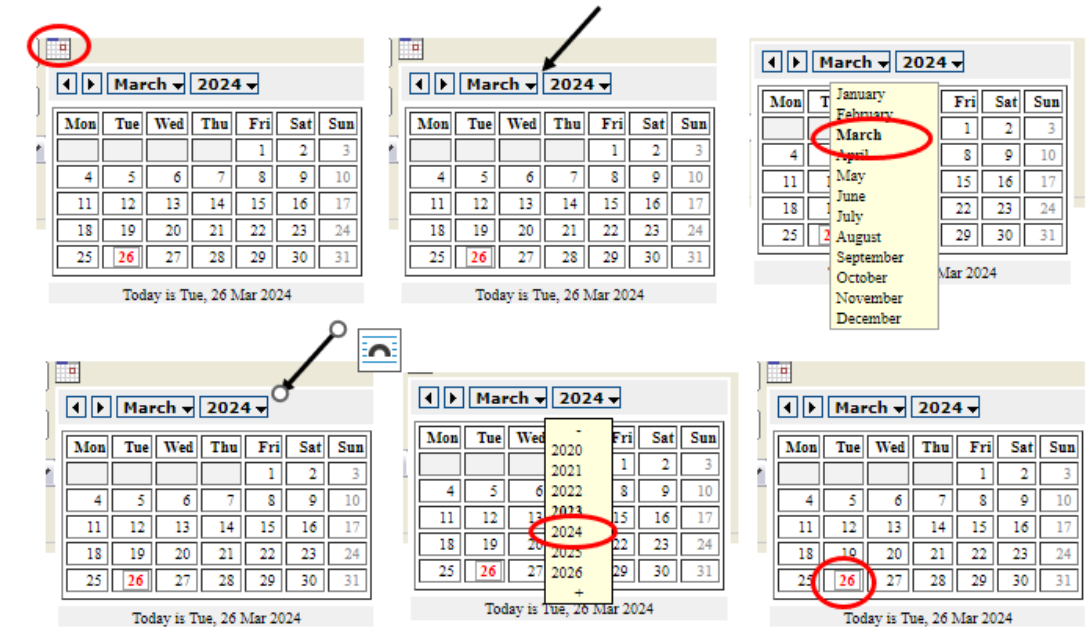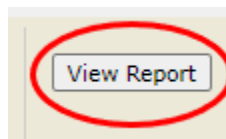
c. Worker: The WSC will choose their name in the drop-down menu.
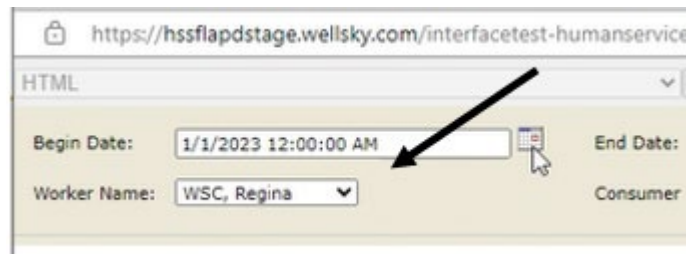
d. Consumer: Click the name of the specific client for which the report is to be run.
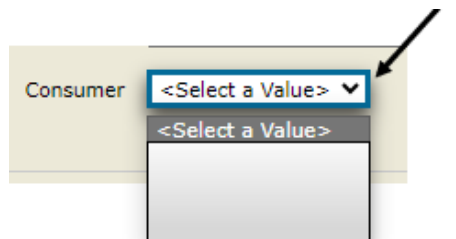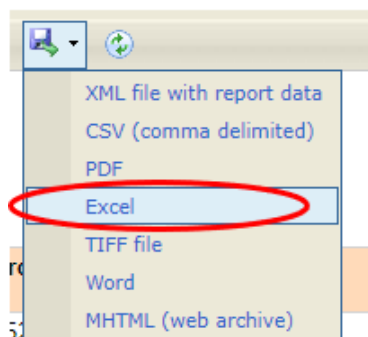

4. Click View Report to execute the search.

5. A report will generate on screen. View the report in this window or export the report.
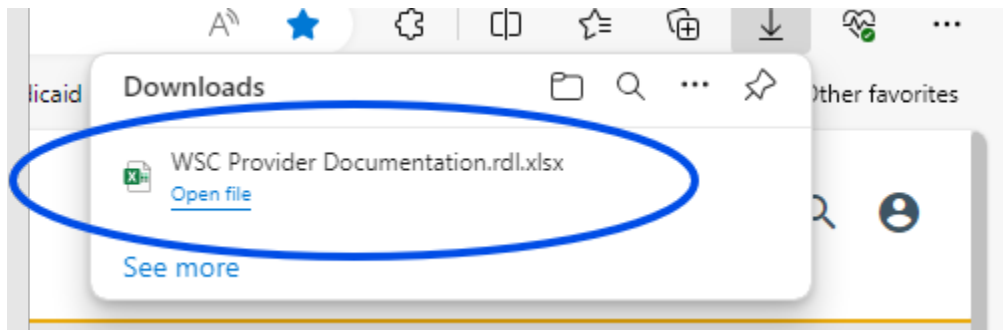
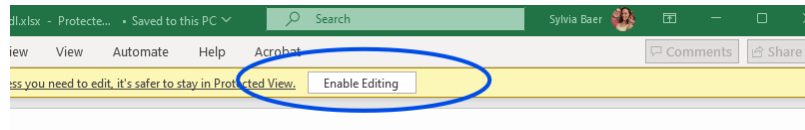a. To export the report, go to the carrot next to the Save icon

b. Select Excel.

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

d. Enable Editing by clicking the button at the top of the screen.

6. Review/filter report as needed.