

## WSC Provider Documentation Report

### 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.

### **NEW!** Roles with access to the WSC Provider Documentation Report:

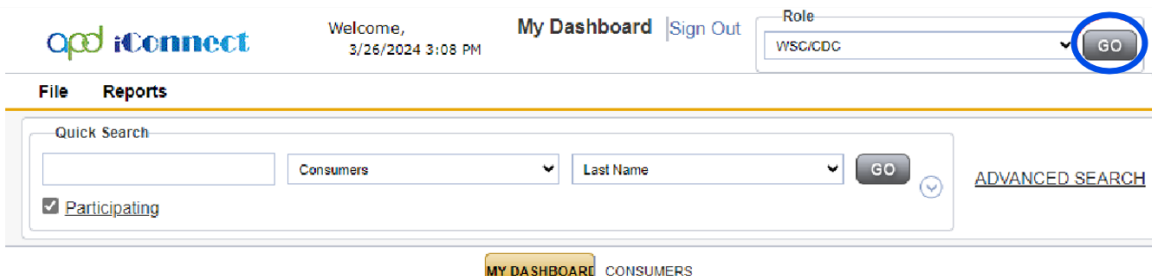
APD Main  
 Region QA Workstream Worker  
 Region QA Workstream Lead  
 ROM/Deputy ROM  
 State Office Worker  
 Tier 1 Help Desk  
 Tier 2 Help Desk  
 WSC/CDC

**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.

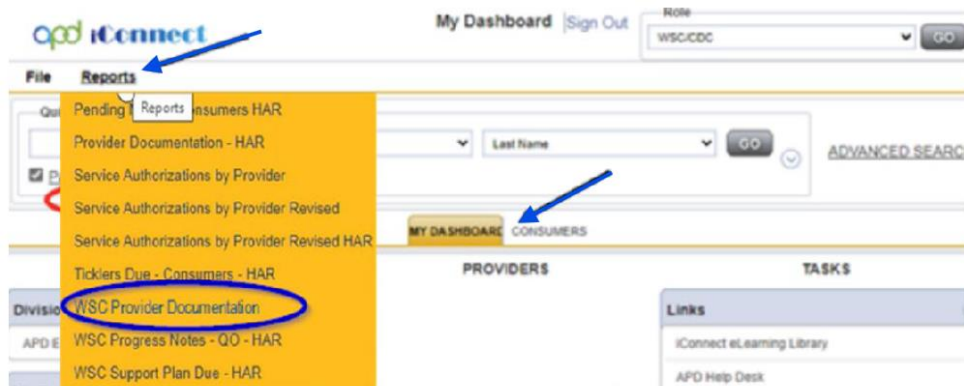
### Pulling the WSC Provider Documentation Report

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

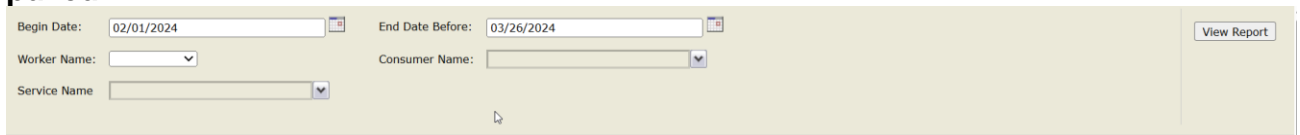


The screenshot shows the iConnect login page. At the top, there is a header with the iConnect logo, a welcome message, the date and time, and links for 'My Dashboard' and 'Sign Out'. On the right, there is a 'Role' dropdown menu currently set to 'WSC/CDC', with a blue circle around the 'GO' button next to it. Below the header, there is a 'File Reports' section. Under 'Reports', there is a 'Quick Search' box with a text input field, a 'Consumers' dropdown, a 'Last Name' dropdown, and a 'GO' button. There is also a checkbox for 'Participating' which is checked. To the right of the 'GO' button is a link for 'ADVANCED SEARCH'. At the bottom of the page, there is a navigation bar with 'MY DASHBOARD' and 'CONSUMERS' buttons.

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

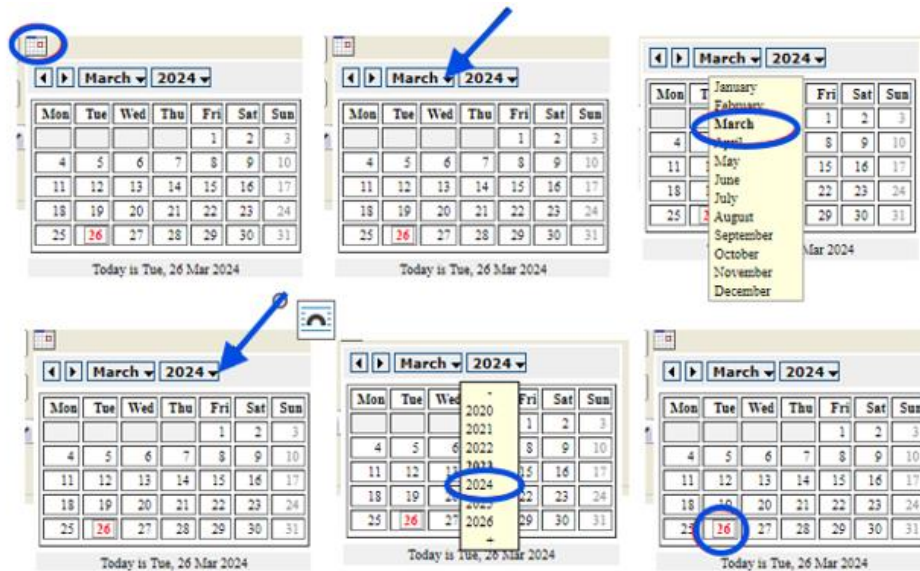


3. Fill out the search screen with the information needed for the report. **It is crucial that the information is filled out in a specific order to allow the report to be pulled.**

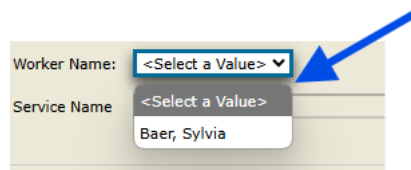


- a. **Begin Date:** Use the start date of the report criteria needed. A date must be selected by clicking on the appropriate date located in the calendar icon. Select the month and year by clicking on the corresponding drop-down menus, and then select the date by clicking on it.
- b. **UPDATED!** **End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

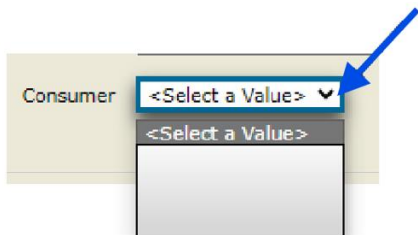
*The selected date parameters default to midnight. When choosing an end date (e.g., 01/31/2025), services running past 12:00:00 AM will not be included in the report. Therefore, to retrieve services provided on 01/31/2025, select 'End Date Before' as 02/01/2025.*



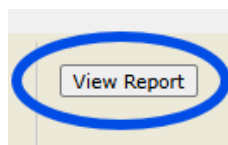
- c. Worker: The WSC will choose their name in the drop-down menu.



- 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.

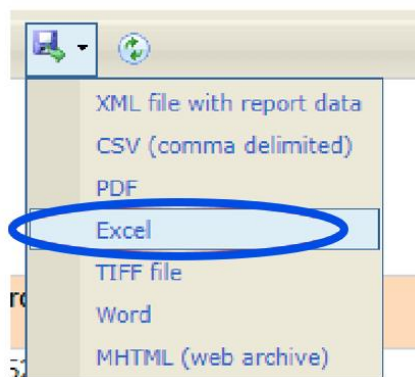


5. A report will generate on screen. View the report in this window or export the report.

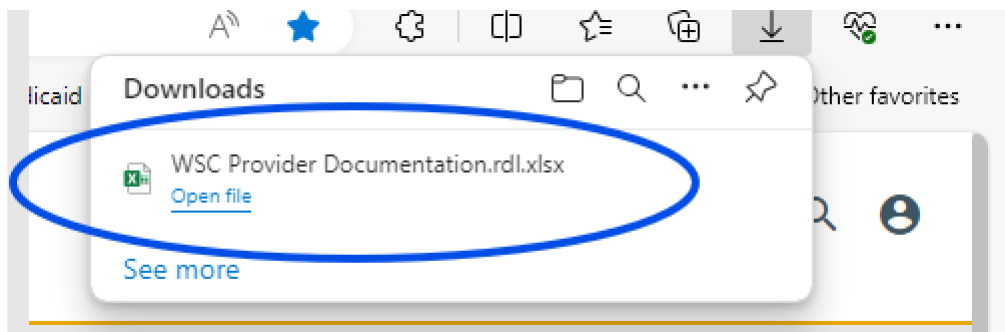
- a. To export the report, go to the carrot next to the Save icon



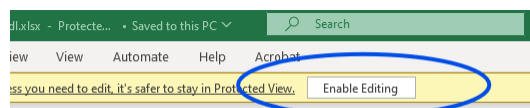
- b. Select **Excel**.



- 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. Utilize the [How to Add Filters to iConnect Reports Job Aid](#) for additional assistance in filtering an iConnect report.