Pulling WSC Support Plan Due Report – Service Provider/ WSC/CDC Roles

Introduction

The Qualified Organization (QO) is responsible for ensuring that Waiver Support Coordinators (WSCs) employed by the QO are meeting requirements for WSCs identified in rule and statue. WSCs are responsible for keeping the support plans for their clients on their caseload updated in iConnect. The WSC Support Plan Due report can assist the QOs and the WSCs in tracking the support plan due dates.

This job aid will encompass using iConnect to pull the WSC Support Plan Due report to allow the QO owners and WSCs to view the due dates of the support plans for clients associated with the QO. The QO owners will have access to view all support plan due dates for clients for whom they have authorizations while the WSC will only have access to those clients that are on their caseload.

The WSC Support Plan Due Report will show the WSC's name under the Primary Worker Name, clients' iConnect ID and name, along with the status(es) of the support plan(s), the effective date of the current support plan and whether the client has had a support plan. The Primary Worker Name for each client is determined by the Primary Worker in the Division tab of the consumer record. If edits are needed to the Division tab, please reach out to the Regional Waiver Liaison. It is important to change the status of past support plans to the Complete status otherwise, those support plans could also be displayed on the report.

Please refer to the [Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook](#) and the [Person-Centered Support Plan Manual](#) for specific requirements on how to construct a Person-Centered Support Plan.

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

Pulling the Support Plan Due Report

1. To begin, log into iConnect and set Role = **Service Provider** or **WSC/CDC**. Click **Go**.
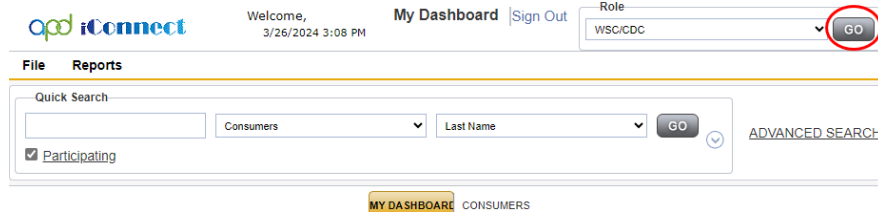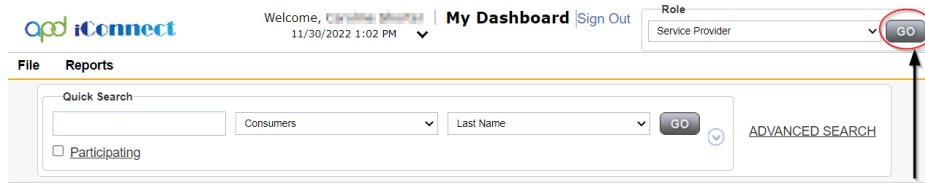
2. On **My Dashboard**, navigate to the **Reports** menu and select **WSC Support Plan Due**.
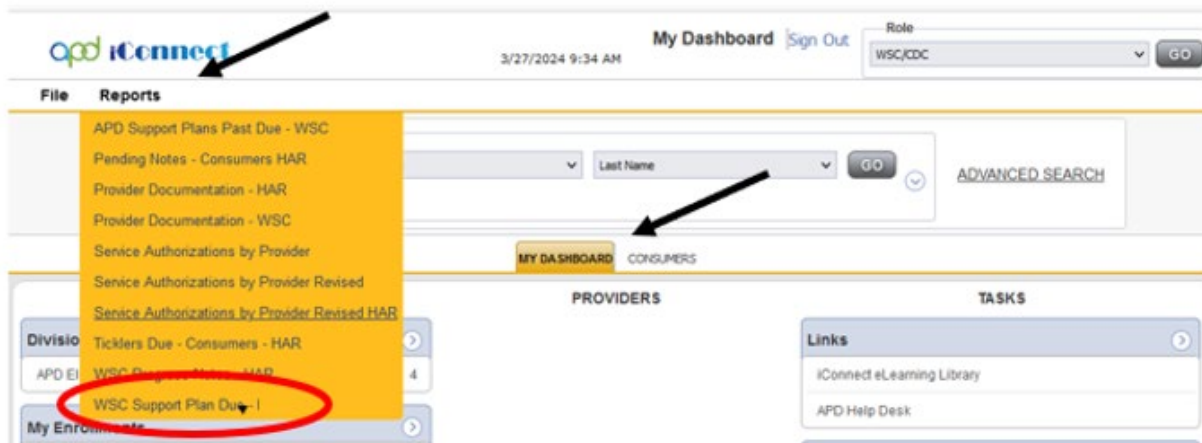
3. Fill out the fields in the specific order as outlined in this job aid to avoid issues with the execution of the search.

   a. Fill out the QO Name in the drop-down menu.

   b. Select the Worker(s) by selecting the check mark. QO owners will have the capability to select any WSC working within their QO. WSCs will only be able to select their name.
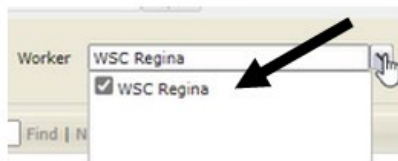
c. Click View Report to execute the search.

4. A report will be generated on screen. View the report in this window or export the report.
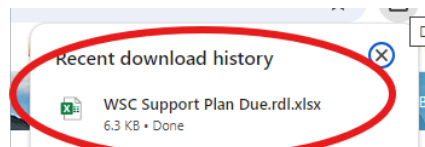

a. To export the report, go to the caret next to the Save (floppy disk) icon.
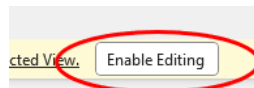

b. Select Excel.
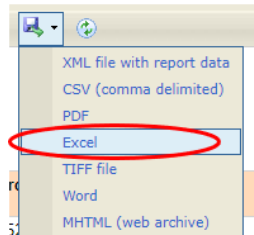
c. The Excel report will be downloaded. Click the report from the computer's downloads.

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

5. Review/filter report as needed.