

Pulling the WSC BASE Renewal Due Report

Introduction

Waiver Support Coordinators (WSCs) are responsible for ensuring that there are no interruptions to their client's services, including the continuation of Behavioral Services. Behavioral services must be reviewed annually as part of the cost plan review process. Some services may be reviewed more frequently, depending on the service and the individual's needs. A report can be generated in iConnect, to assist the WSC in determining when to initiate the renewal process for the Behavior Analysis Services Eligibility (BASE). The WSC BASE Renewal Due report will identify all the clients on the WSC's caseload that have/had a BASE completed in iConnect. The report will indicate, for each LRC Chair BASE form, the review date and the next review date for each behavioral service.

REMINDER: Personal Health Information (PHI) will be included when exporting the WSC BASE Renewal Due report. It is the responsibility of all iConnect users to ensure that their systems follow all HIPAA requirements.

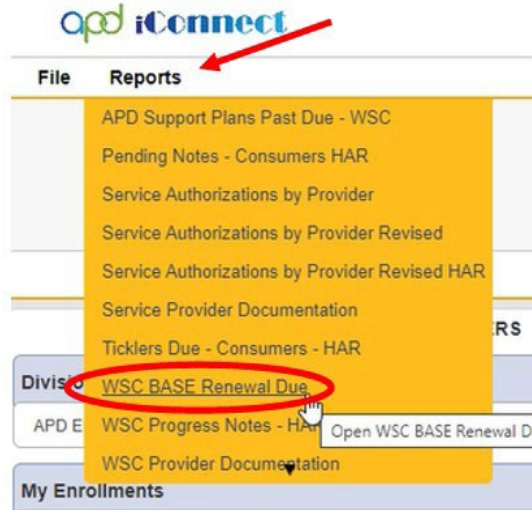
Pulling the WSC BASE Renewal Due Report

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

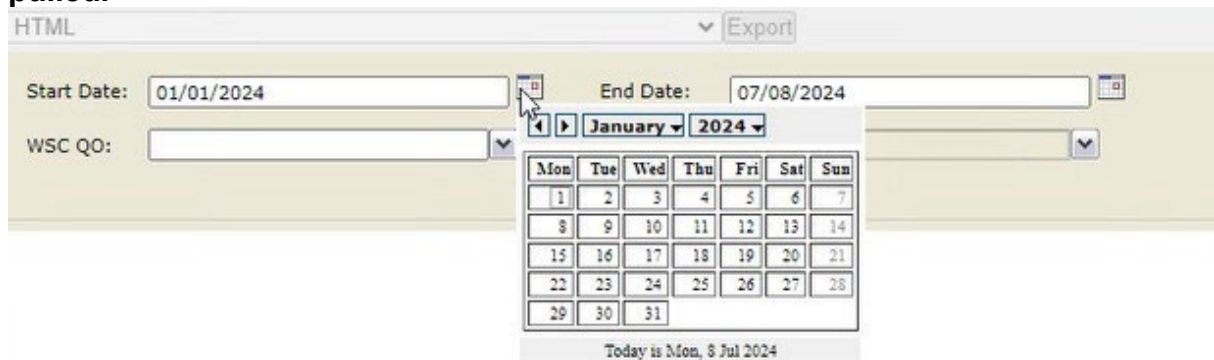
The screenshot shows the iConnect dashboard interface. At the top left is the 'apod iConnect' logo. To the right, it says 'Welcome, [User Name]' and '11/30/2022 1:02 PM'. In the center, there are links for 'My Dashboard' and 'Sign Out'. On the right, there is a 'Role' dropdown menu currently set to 'Service Provider'. The 'GO' button next to the dropdown is circled in red, with an arrow pointing to it from the right. Below the navigation bar, there are tabs for 'File' and 'Reports'. A search bar is visible with a 'Quick Search' field, a dropdown for 'Consumers', a dropdown for 'Last Name', and a 'GO' button. There is also a checkbox for 'Participating' and a link for 'ADVANCED SEARCH'. At the bottom, there are tabs for 'MY DASHBOARD', 'CONSUMERS', and 'PROVIDERS'.

The screenshot shows the iConnect dashboard interface. At the top left is the 'apod iConnect' logo. To the right, it says 'Welcome, [User Name]' and '3/26/2024 3:08 PM'. In the center, there are links for 'My Dashboard' and 'Sign Out'. On the right, there is a 'Role' dropdown menu currently set to 'WSC/CDC'. The 'GO' button next to the dropdown is circled in red. Below the navigation bar, there are tabs for 'File' and 'Reports'. A search bar is visible with a 'Quick Search' field, a dropdown for 'Consumers', a dropdown for 'Last Name', and a 'GO' button. There is also a checkbox for 'Participating' and a link for 'ADVANCED SEARCH'. At the bottom, there are tabs for 'MY DASHBOARD' and 'CONSUMERS'.

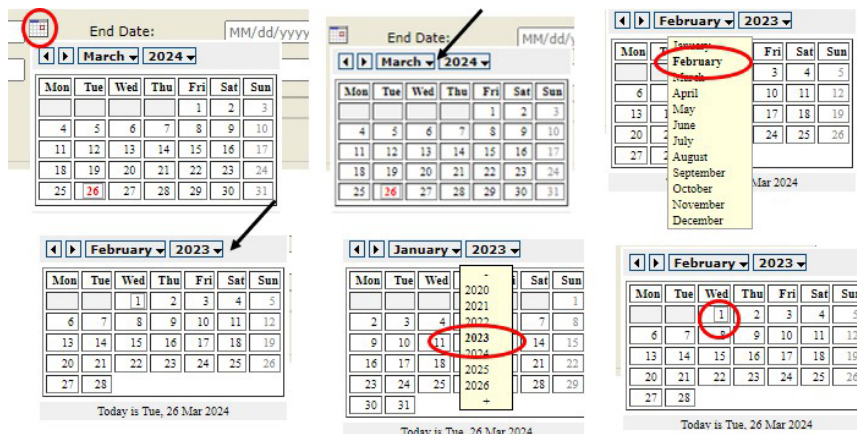
2. On **My Dashboard**, navigate to the **Reports** menu and select **WSC BASE Renewal Due**.



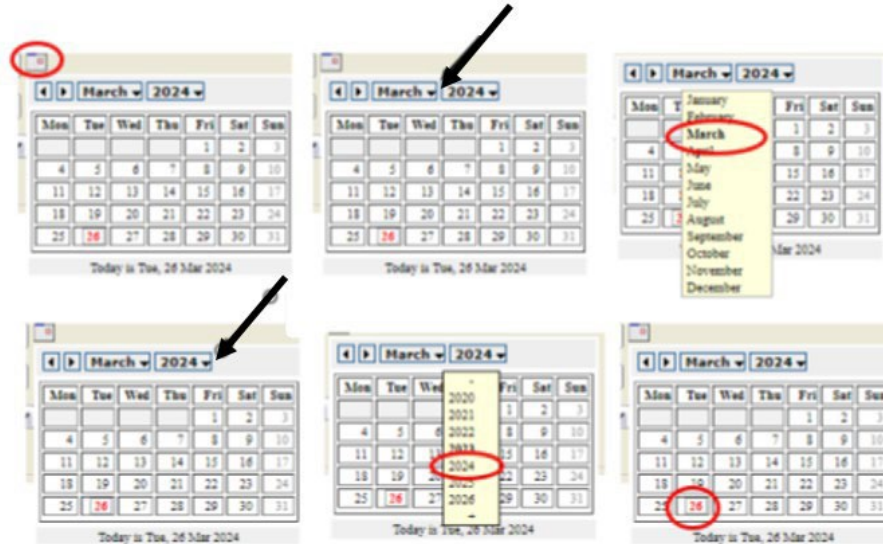
3. Fill out the search screen with the needed information for the report. **It is crucial that the information is filled out in a specific order to allow the report to be pulled.**



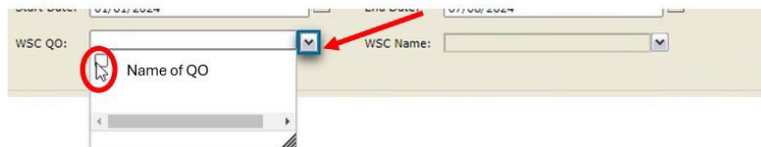
- a. **Begin Date:** Use the start date of the report criteria needed. A date must be selected by clicking on the appropriate date located in the calendar icon. Select the month and year by clicking on the corresponding drop-down menus, and then select the date by clicking on it.



- 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.

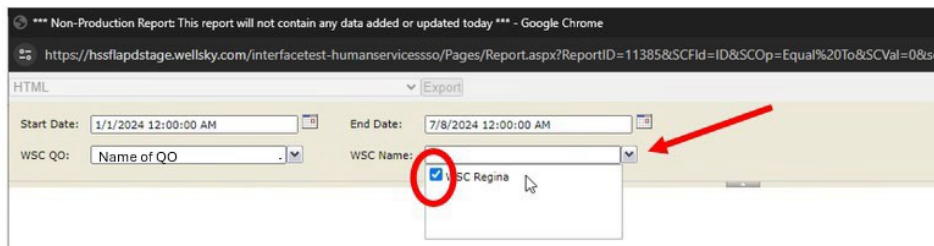


- c. WSC QO: In the drop-down menu check the QO's name.

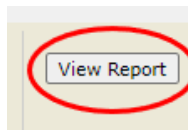


- d. WSC Name: In the drop-down menu check the name(s) of the WSC(s) needed to be displayed in the search.

Note: Service Provider role will have access to all WSCs employed with their QO whereas the WSC/CDC role will only have access to their own name.



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



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

HTML Export

Start Date: 1/1/2024 12:00:00 AM End Date: 7/8/2024 12:00:00 AM View Report

WSC QO: [REDACTED] WSC Name: [REDACTED]

1 of 1 Find | Next

WSC BASE Renewal Due

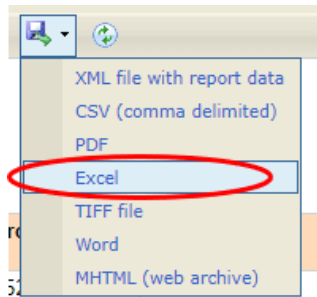
Report Run Time :7/8/2024 3:43:31 PM

iConnectID	Consumer First Name	Consumer Last Name	Primary Worker	WSC QO	Form Name	Form Worker	Review Date	Form Status	Behavior
[REDACTED]	[REDACTED]	[REDACTED]	WSC, Susie	[REDACTED]	LRC Chair BASE	Sims, Zachariah	7/3/2024	Complete	07/03/2024
[REDACTED]	[REDACTED]	[REDACTED]	WSC, Susie	[REDACTED]	LRC Chair BASE	Sims, Zachariah	7/3/2024	Complete	01/03/2024

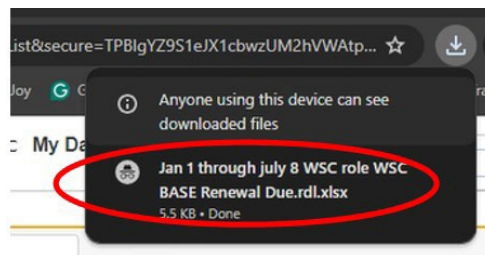
a. To export the report, go to the caret next to the Save (floppy disk) icon.



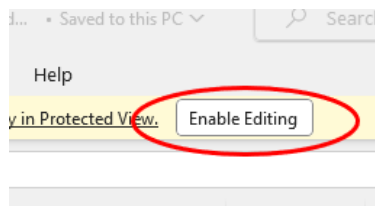
b. Select Excel.



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, and sort report as needed.