State of Florida

Agency for Persons with Disabilities

iConnect
Worker Portal Training Manual Version 3
04-16-2024

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Introduction

During a home visit, the user may not have a reliable internet source therefore unable to log into iConnect and complete consumer forms. iConnect's Worker Portal functionality allows the user to complete iConnect forms without an internet connection and once re-connected, sync to the client's iConnect record. The use of this functionality is optional.

If a form requires using the Duplicate and Copy Shared Response functionalities, the user will need to sign into the Consumer's record within iConnect and complete those tasks prior to downloading the respective forms. See iConnect Preparations Below.
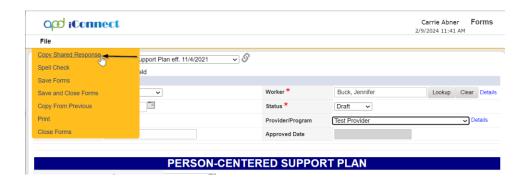
As Needed: iConnect Preparations

PCSP Example: Using Copy Shared Response in iConnect

The Copy Shared Response functionality is used to pull the responses from the QSI into the Person-Centered Support Plan (PCSP). The Copy Shared Response functionality doesn't currently exist in the Worker Portal but with a little preparation, can still be used. **Before going onsite, users can start the PCSP form, perform the Copy Shared Response task in iConnect and save the form.** When in the Worker Portal, the user will be updating an existing form vs. adding a new form.

1. Log into iConnect. Navigate to the client record and select the **Forms** tab.

2. From the **File** menu, select **Add Form**.

3. The Form details page displays, update the following fields:

   a. **Select Type**: Person-Centered Support Plan eff. 11/4/21
   b. **In the header, Review:** Select Initial or Annual
   c. **In the header, Review Date**: defaults to today
   d. **In the header, Division**: Defaults to APD
   e. **In the header, Worker:** default to self.
   f. **In the header, Status:** defaults to Draft. It will be updated later in the workflow.
   g. **In the header, Provider/Program**: select the Qualified Organization.

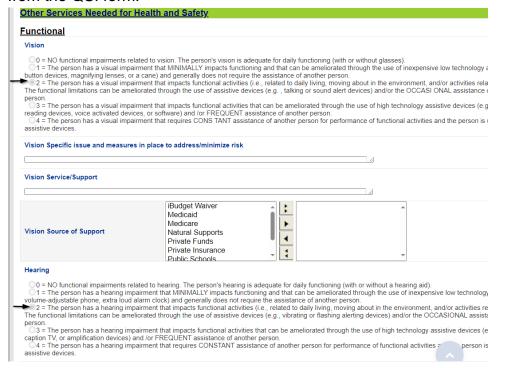4. From the **File** menu, select **Copy Shared Response** to populate with data from QSI form to the PCSP form.

5. A list of forms that have data that populates the PCSP form are listed. Select the **most recent QSI** form from the list.

6. The page refreshes and the PCSP is populated with the values from the QSI form.

7. The PCSP Form has been started and will be updated/completed in the Worker Portal. From the **File** menu, select **Save and Close Form.**

8. Proceed to Make Available Offline if the user will be offline when updating this form in the Worker Portal.

9. Proceed to Completing the Form Online if the user will be online when updating this form in the Worker Portal.

WSC Note on Goals:

The goals within the Person-Centered Support Plan (PCSP) are only fillable when the Person-Centered Support Plan is created and saved within iConnect.

If the user Adds the PCSP within the worker Portal, the goal fields cannot be filled out on site. Just follow the appropriate steps:

- WSCs must save the PCSP in **Draft Status** within the Worker Portal
- **Synchronize** the form to the consumer record
- Navigate to the form within iConnect, Copy Shared Responses, then fill out the Goals that were not completed in the Worker Portal.
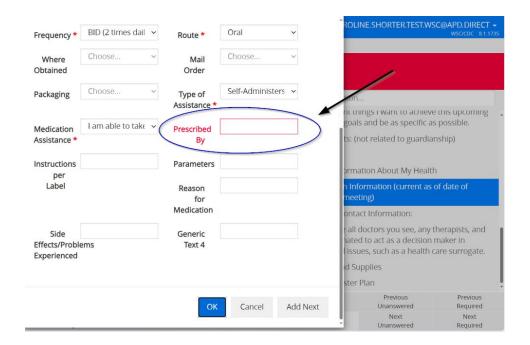- Change to form to **Open** status and **save**.

WSC Note on Medication Entry:

Most required fields within the PCSP contain an asterisk apart from the "Prescribed By" text field.

- When adding a new Medication, WSCs must add the Prescriber's information in this text box prior to clicking OK or the Worker Portal will not save the medication and highlight the field in red.

QSI Assessments (QSI Assessor Note)

The calculations within the QSI Assessment do not function within the Worker Portal.

- QSI Assessors must save their Assessments in **Draft Status** within the Worker Portal
- **Synchronize** the form to the consumer record
- Navigate to the form within iConnect and **save** the form to ensure that all appropriate scoring configurations are implemented
- Once score has been updated and validated, change to form to **Complete** status and **save**.

Completing the Form Online

If there will be an internet connection when filling out the form in the Worker Portal, no additional preparations need to be made prior to working in the forms.
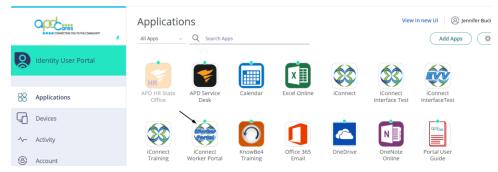
1. The user is face to face with the client and will complete the form on a mobile device with internet connectivity.

2. If you do not plan to be offline you do not need to download client information to your device.
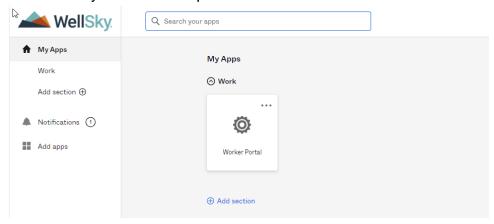
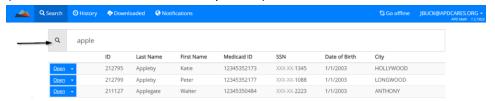3. To begin, log into iConnect CyberArk User Portal.

4. Select the **iConnect Worker Portal** icon.

5. The WellSky User Portal opens. Select Worker Portal.
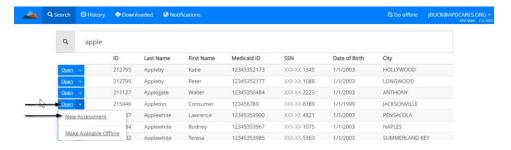

6. Search for the client record by last name, Case number, DOB (include forward slashes and the year in four digits), SSN (include dashes in correct sequence) or Medicaid ID.
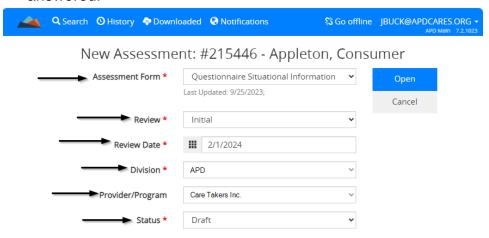

Note: The iConnect ID (Case Number) and Date of Birth (DOB) require complete values for searches. In other words, you cannot add 3 digits and hope to retrieve the consumer's record.

7. Select '**New Assessment**' from the flyout menu to create a new form. Select '**Open'** to display a list of existing forms for the client.
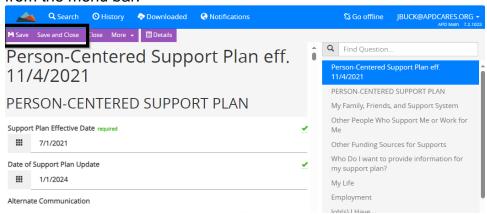
8. If adding a new form, update the following:
   a. **Assessment Form**: Select the form that needs to be completed
   b. **Review**: Select the correct value as it pertains to the form being completed
   c. **Review Date**: defaults to today – the day the form was created
   d. **Division**: Select APD
   e. **Program**: Select own provider record
   f. **Status**: defaults to Draft. It will be changed to Complete or Open (depending on how the original workflows were designed) later in the workflow when all questions have been answered.

9. Select **Open**. The form displays.

10. Complete the fields in the form. See the Working with the Form section.

11. It is best practice to save your progress often. Select **Save** from the menu bar.

12. When you have completed the form, select **Save and Close** from the menu bar.

13. Your updates are synchronized automatically and immediately to iConnect when you save in the Worker Portal. A "Saved to the Database" message will display
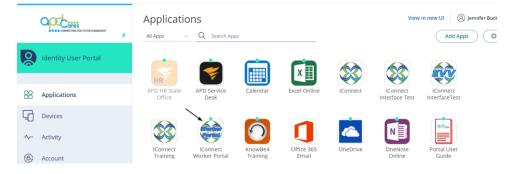

14. No process with the Notifications queue is needed. The form is visible immediately on the client's **Forms** tab.
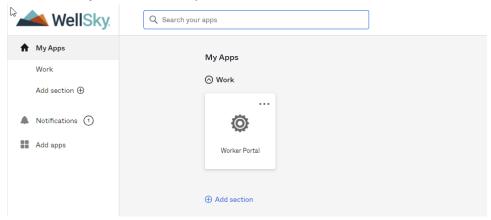
Make Available Offline

If there will not be an internet connection when filling out the form in the Worker Portal, some preparation steps must occur first when there is an internet connection. Clients' data will be downloaded and temporarily stored on the user's device so it can be accessed when offline. If there is an internet connection when filling out the form, skip to the Conducting the Form Online section.

1. To begin, log into iConnect CyberArk User Portal.

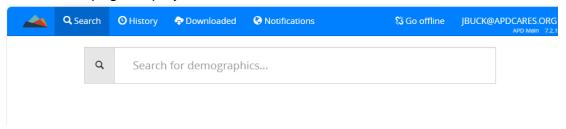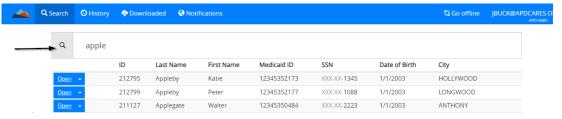2. Select the **iConnect Worker Portal** icon.

3. The WellSky User Portal opens. Select Worker Portal.

4. The search page displays.

5. Search for the client record by last name, Case number, DOB (include forward slashes and the year in four digits), SSN (include dashes in correct sequence) or Medicaid ID.

Note: The iConnect ID (Case Number) and Date of Birth (DOB) require complete values for searches. In other words, you cannot add 3 digits and hope to retrieve the consumer's record.

6. When the search results appear, select on the **flyout menu** beside the Open option and then select **Make Available Offline.**

7. A **cloud icon** appears next to the client's name and is listed on the **Downloaded** tab.

8. Repeat the process for each client the user will be completing a face to face visit for that day.
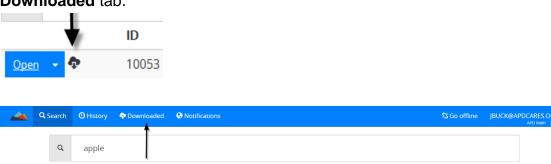
CAUTION

When you download client records to complete forms, they are saved to the local device storage.
The forms are ONLY on your local device until you have an internet connection and synchronize with iConnect. **Deleting your browser cache / temporary internet files will permanently remove all assessment data from your mobile device**. If you delete your browser cache, any forms that have not been synchronized will be lost.

Remember: Cache is the web browser history.

Conducting the Form Offline

The user is face to face with the client and will complete the form on a mobile device with no internet connectivity. It is critical to remember that the user will need to have internet access to log into the Worker Portal using Cyberark and the user must Go Offline so that they can use the worker portal without internet access.
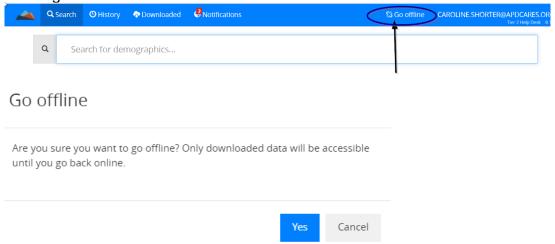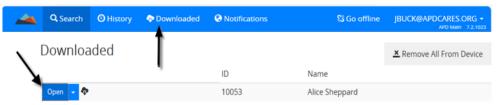
CAUTION

You must have an internet connection to begin this process.

1. While online, log into the Worker Portal through CyberArk.

2. Within the Worker Portal, select **Go Offline** and acknowledge the warning message.

Once the user goes offline, there is a 48-hour window in which the worker portal will remain in idle status so the user doesn't need to sign in through CyberArk. The user should be able to open the Worker Portal site without needing to sign back in and resume with the following steps.

3. Select **Downloaded** tab from the top toolbar.
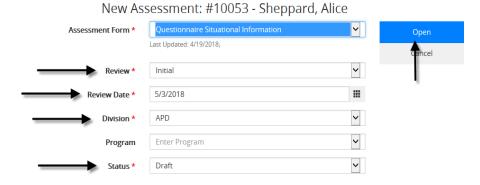
4. Select **Open** next to the client's name.

5. A list of existing forms for the client that the user has downloaded to his/her device is displayed. Select **Open** to edit an existing form. Skip to step 10.

6. Select **New** to add a new form.

Consumer #10053 - Sheppard, Alice

New	Review Date	Form	Worker	Last Updated	Status
Open	4/13/2018	Person Centered Support Plan	Buck, Jennifer	04/27/2018 10:19 am	Pending
Open	4/27/2018	Sexually Maladaptive Behavior	Buck, Jennifer	04/27/2018 10:16 am	Complete
Open	4/27/2018	Sexually Maladaptive Behavior	Buck, Jennifer	04/27/2018 10:04 am	Complete

7. Complete the following fields:
   a. **Assessment Form**: Select the form that needs to be completed
   b. **Review**: Select the correct value as it pertains to the form being completed
   c. **Review Date**: defaults to today – the day the form was created
   d. **Division**: Select APD
   e. **Program**: Select own provider record
   f. **Status**: Keep in Draft. It will be marked as Complete or Open (depending on original workflow designed for the Form) later in the workflow

New Assessment: #10053 - Sheppard, Alice

Assessment Form * — Questionnaire Situational Information
Last Updated: 4/19/2018;

Review * — Initial

Review Date * — 5/3/2018

Division * — APD

Program — Enter Program

Status * — Draft

Open / Cancel

8. Select **Open**. The selected form is displayed.

9. Complete the fields in the form. See the Working with the Form section.
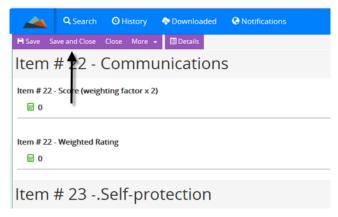
CAUTION

Do not refresh the page while working within the form as all data will be lost.

10. It is best practice to save your progress often. Select **Save** from the menu bar. A "Saved to Device Storage" message will display.

#10002 - Test, Apple - Risk Assessment - 4/17/2016 was saved to device storage.

11. When you have completed the form, select **Save and Close** from the menu bar.

12. The client's form is saved on the **Notifications** tab. All forms saved offline are saved to the Notifications tab and will later be saved to the iConnect application when internet connectivity is restored.

13. Repeat these steps for each additional form that needs to be completed.

14. Proceed to the Synchronize the Form section.

Working with the Form
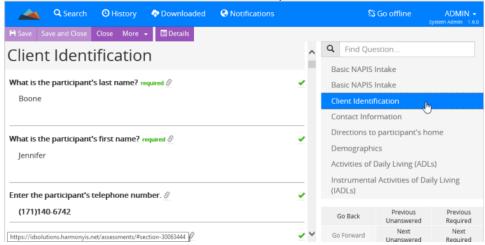
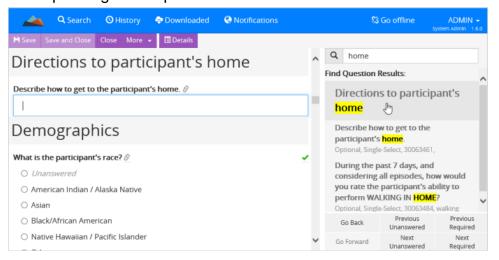The look and feel of the form in the Worker Portal is different than iConnect.

CAUTION

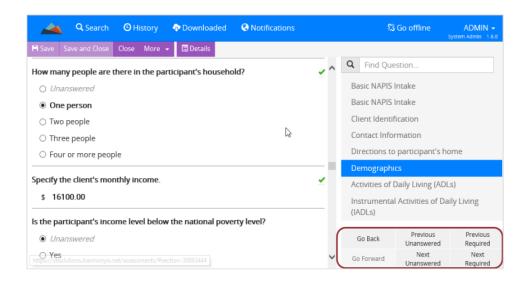Do not refresh the web browser/device while filling out the forms as all unsaved data will disappear.

1. The Assessment Form window includes a menu bar at the top, the form on the left side of the screen, and navigation options on the right side of the screen.

2. The first navigation pane is located on the top right side of the screen. It displays the sections of the form. To jump to another section, click the section header in the pane.
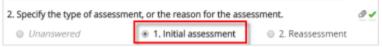
3. Use the search bar to search for a question by keyword. Type a keyword in the search bar. The search results are shown below the search bar. Click a search result to navigate to the corresponding form topic.
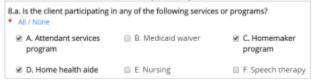
4. The lower right side of the form screen includes a menu to navigate to the next and previous questions. You can easily jump to questions that are unanswered or are required within the form.
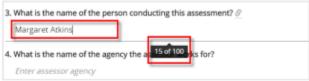
5. Each form contains specific questions. Some questions require a single response while others allow you to select multiple answers.
    a. Single Select — Select a single response

    b. Multi Select — Select multiple responses.

    c. Free Text — Type information into the field. Note that a character count is displayed as you type

    d. Calendar — Select a date from the calendar or type it in the application

6. For each question, select the best response. A green checkmark is displayed to the right of the question when the question has been answered.

7. While you are working in the Form window, many questions will include an icon that provides valuable information. These icons are described in the list below.

- ![red asterisk] or **required** — The asterisk or red required text signifies required information.

- **required** The green required text signifies required information that contains an answer.

- ✔ — The green check mark shows that question is completed.

- 🔗 — The link icon signifies questions that are linked to the Human Services consumer record.

- ▦ — Click a calendar icon to select a date from the pop up calendar.

- 🕐 — Click a clock icon to select a time from the pop up.

8. When adding Contacts to the forms, you may see the following buttons.

🔍 Search   🔗 Attach

- Search – This button is used to search for a New Contact. Just like in iConnect, you must search to ensure that the contact does not already exist in iConnect.
  REMINDER: All Relations in iConnect are Case Relations. When searching for a relation, change Family to Case in the last drop-down box.

If the contact is new to iConnect, the New button will appear. Once you click New, you will follow the prompts in the application.

- Attach – This button is used to attach an Existing Contact into the Form.

Keyboard Shortcuts

Below is a quick-reference of the keyboard shortcuts that can also
be found within the worker portal:

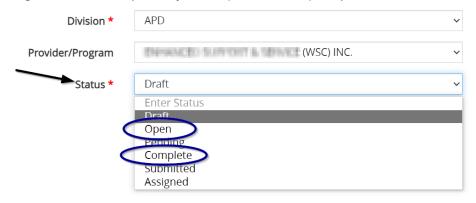| Site-wide shortcuts		
This Screen	ctrl+k	Open the keyboard shortcuts page.
Go Back	ctrl+shift+b	Navigate to the previous page.
Goto Search	ctrl+shift+s	Navigate to the search page.
Goto History	ctrl+shift+h	Navigate to the history page.
Goto Downloaded	ctrl+shift+d	Navigate to the downloaded consumers page.
Goto Notifications	ctrl+shift+n	Navigate to the notifications page.
Debug information	ctrl+shift+z	Display debug information for developers.
Dialogs		
Submit	enter	Submit the dialog.
Cancel	esc	Cancel the dialog.
Forms		
Save	ctrl+s	Save the record.
Close	ctrl+e	Close the record.
Revert	ctrl+u	Revert all unsaved changes.
Assessment		
Find Question	ctrl+f	Focus the find question text box.
Goto Section List	ctrl+l	Focus the assessment section/subsection navigation list.
Next	tab, down	Navigate to the next question.
Previous	shift+tab, up	Navigate to the previous question.
Go Back	ctrl+left	Navigate backwards in the question history.
Go Forward	ctrl+right	Navigate forward in the question history.
Next Unanswered	shift+down	Navigate to the next unanswered question.
Previous Unanswered	shift+up	Navigate to the previous unanswered question.
Next Required	ctrl+down	Navigate to the next required question.
Previous Required	ctrl+up	Navigate to the previous required question.
Next Choice	right	Navigate to the next choice (single and multi-select questions).
Previous Choice	left	Navigate to the previous choice (single and multi-select questions).
Edit	ctrl+i	Edit the assessment properties.

Update the Form Status prior to Sync

This is an option that the user can choose to use in the Worker Portal prior to sync or complete within iConnect once the form has been synchronized. **The user must update the final status of the form in accordance with the form's instructions.**

1. Once the form has been completed, click on the Details button

2. Update the Status from Draft to the appropriate status from the original workflow (usually "Complete" or "Open")
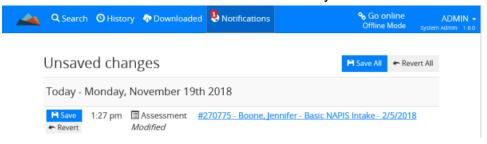

Proceed to Synchronize the Form

Synchronize the Form

When the user is reconnected to the internet, the forms completed offline in the Worker Portal need to be synchronized to the iConnect application. This is completed on the Notifications tab. Notifications are alerts that require attention, for example, when new forms have been created and not yet synchronized to the server.

1. Log into Worker Portal when network connectivity is reestablished.

2. Select on **Notifications** tab from the top toolbar. If updated records exist on the mobile device that have not yet been
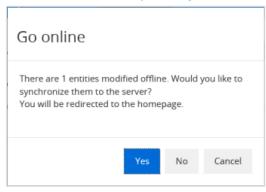
synchronized, the Notifications tab will include a red icon that shows the number of records that are out of sync.
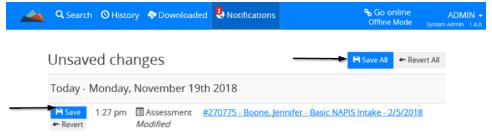

3. The Worker Portal should prompt you automatically to synchronize to the server or do it automatically the next time you are online.
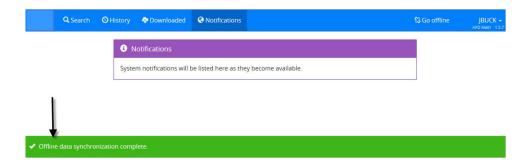
    Note: If this doesn't occur automatically, click the "Go online" and it will push synchronization.

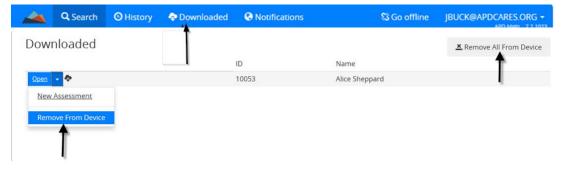4. If not, select on **Save All** or individually **Save**, to copy the form(s) to iConnect application.

5. The records on the Notifications tab are removed and a save notifications icon appears.
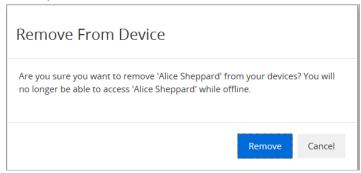
Remove Records from Device

It is important to remove the form from your device after syncing with iConnect to avoid confusion or accumulating unnecessary data on your device that could impact the performance of your device.

1. Log into Worker Portal when network connectivity is reestablished.

2. Select the **Downloaded** tab.

3. For each Client, select **Remove from Device** from the fly out menu of the Open tab or Select **Remove All From Device** icon to remove all the records.

4. Accept the confirmation.

5. Once removed, the record will no longer display in the Downloaded list.