



agency for persons with disabilities  
*State of Florida*

**State of Florida**  
**Agency for Persons with Disabilities**

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

Table of Contents

**Introduction**..... 3

**As Needed: iConnect Preparations** ..... 3

    PCSP Example: Using Copy Shared Response in iConnect ..... 3

    WSC Note on Goals: ..... 5

    WSC Note on Medication Entry: ..... 5

    QSI Assessments (QSI Assessor Note) ..... 6

**Completing the Form Online** ..... 6

**Make Available Offline**..... 9

**Conducting the Form Offline**..... 11

**Working with the Form**..... 14

    Keyboard Shortcuts..... 18

    Update the Form Status prior to Sync ..... 19

**Synchronize the Form** ..... 19

**Remove Records from Device** ..... 21

## 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](#).

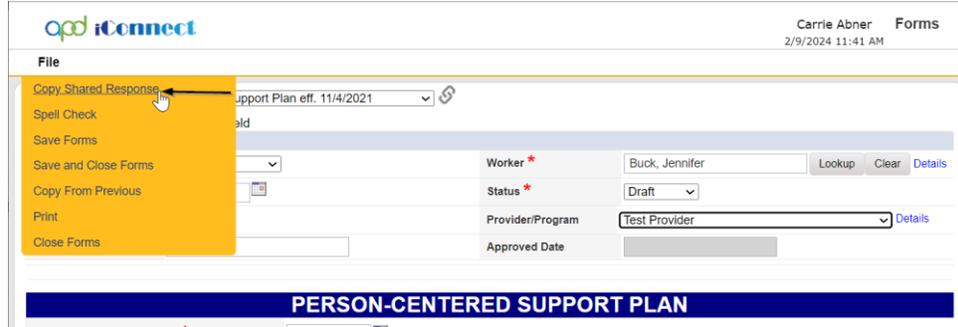
## As Needed: iConnect Preparations

### 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.

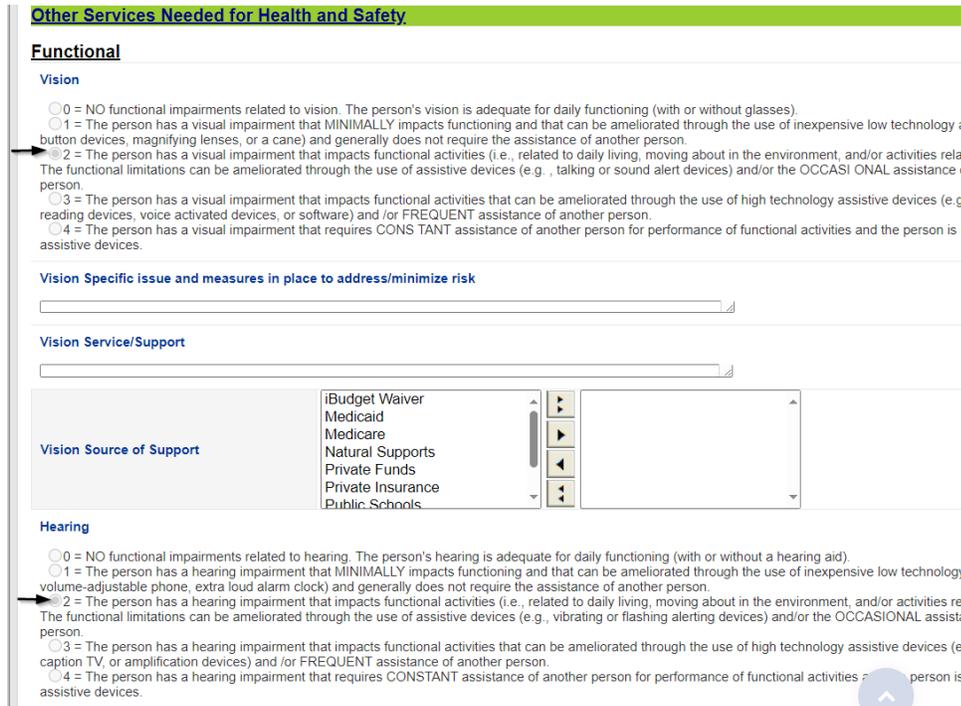
# Worker Portal



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



- 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.

## Worker Portal

The screenshot shows a medication form with the following fields:

- Frequency \* BID (2 times daily)
- Route \* Oral
- Where Obtained Choose...
- Mail Order Choose...
- Packaging Choose...
- Type of Assistance \* Self-Administers
- Medication Assistance \* I am able to take
- Prescribed By (circled in blue and highlighted with a red border)
- Instructions per Label
- Parameters
- Reason for Medication
- Side Effects/Problems Experienced
- Generic Text 4

At the bottom are buttons for OK, Cancel, and Add Next. To the right, a mobile device screen shows a patient's medication list with a red header and a list of medications.

## 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**.

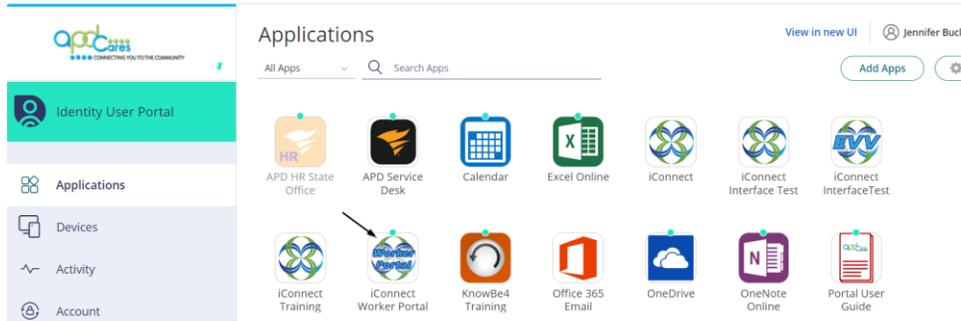
## Completing the Form Online

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.

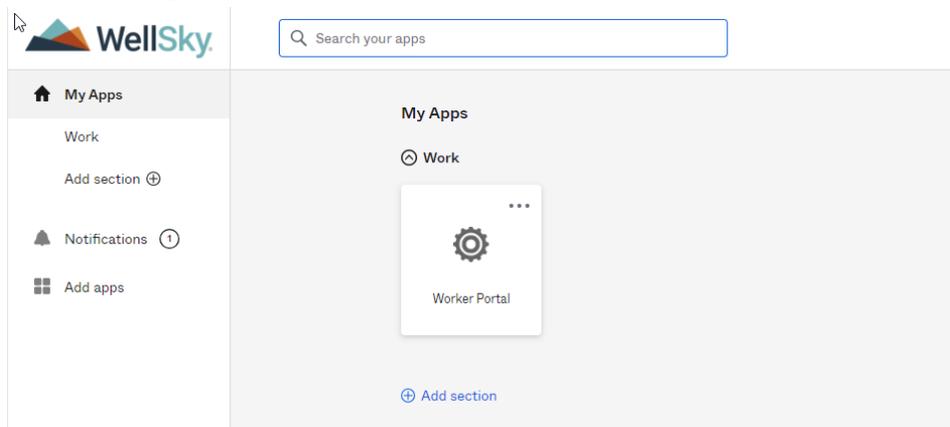
1. The user is face to face with the client and will complete the form on a mobile device with internet connectivity.
2. If you do not plan to be offline you do not need to download client information to your device.
3. To begin, log into iConnect CyberArk User Portal.

# Worker Portal

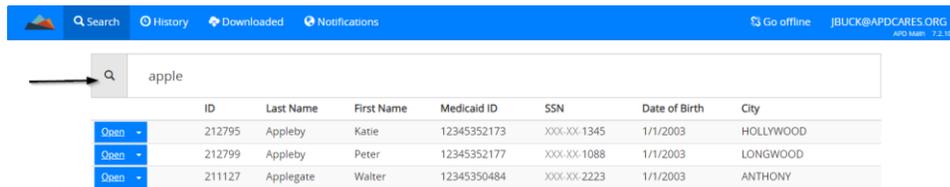
4. Select the **iConnect Worker Portal** icon.



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.

## Worker Portal

The screenshot shows a search bar with 'apple' entered. Below it is a table of search results. The table has columns for ID, Last Name, First Name, Medicaid ID, SSN, Date of Birth, and City. The first five rows are highlighted in blue, and the first row has a mouse cursor over the 'Open' button. Below the table are two buttons: 'New Assessment' and 'Make Available Offline'.

	ID	Last Name	First Name	Medicaid ID	SSN	Date of Birth	City
Open	212795	Appleby	Katie	12345352173	XXX-XX-1345	1/1/2003	HOLLYWOOD
Open	212799	Appleby	Peter	12345352177	XXX-XX-1088	1/1/2003	LONGWOOD
Open	211127	Applegate	Walter	12345350484	XXX-XX-2223	1/1/2003	ANTHONY
Open	215446	Appleton	Consumer	123456789	XXX-XX-6789	1/1/1999	JACKSONVILLE
New Assessment	37	Applewhite	Lawrence	12345353990	XXX-XX-4821	1/1/2003	PENSACOLA
Make Available Offline	34	Applewhite	Rodney	12345353967	XXX-XX-1075	1/1/2003	NAPLES
	32	Applewhite	Teresa	12345353985	XXX-XX-5363	1/1/2003	SUMMERLAND KEY

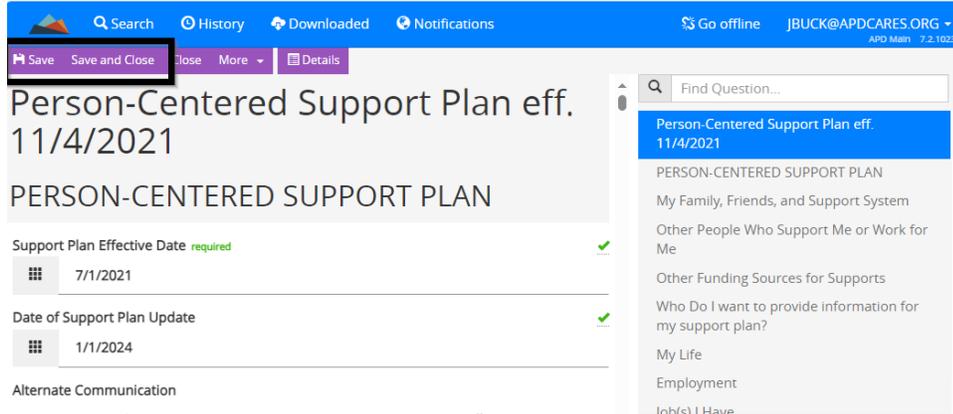
8. If adding a new form, update the following:
  - a. **Assessment Form:** Select the form that needs to be completed
  - b. **Review:** Select the correct value as it pertains to the form being completed
  - c. **Review Date:** defaults to today – the day the form was created
  - d. **Division:** Select 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.

The screenshot shows a form titled 'New Assessment: #215446 - Appleton, Consumer'. The form has several fields with arrows pointing to them from the left. The fields are: 'Assessment Form' (dropdown menu with 'Questionnaire Situational Information' selected), 'Review' (dropdown menu with 'Initial' selected), 'Review Date' (calendar icon with '2/1/2024' selected), 'Division' (dropdown menu with 'APD' selected), 'Provider/Program' (dropdown menu with 'Care Takers Inc.' selected), and 'Status' (dropdown menu with 'Draft' selected). There are 'Open' and 'Cancel' buttons on the right side of the form. The top of the form has a blue header with search, history, download, and notification icons, and a user profile 'JBUCK@APDCARES.ORG'.

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.

## Worker Portal

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



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

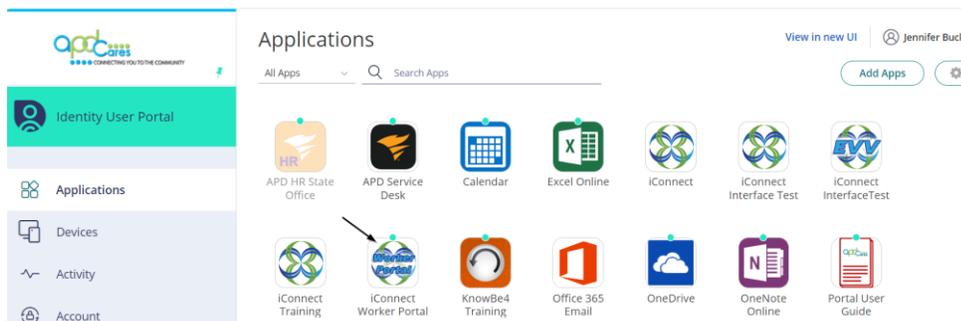


- No process with the Notifications queue is needed. The form is visible immediately on the client’s **Forms** tab.

## Make Available Offline

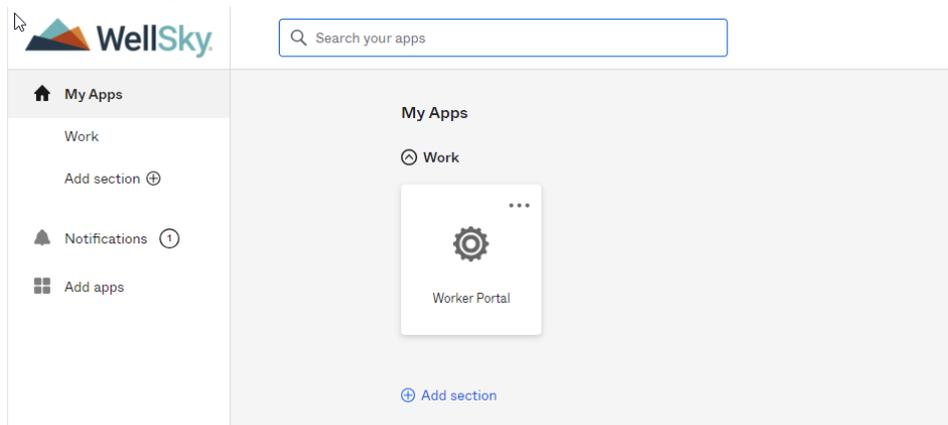
If there will not be an internet connection when filling out the form in the Worker Portal, some preparation steps must occur first when there is an internet connection. Clients’ data will be downloaded and temporarily stored on the user’s device so it can be accessed when offline. If there is an internet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

- To begin, log into iConnect CyberArk User Portal.
- Select the **iConnect Worker Portal** icon.

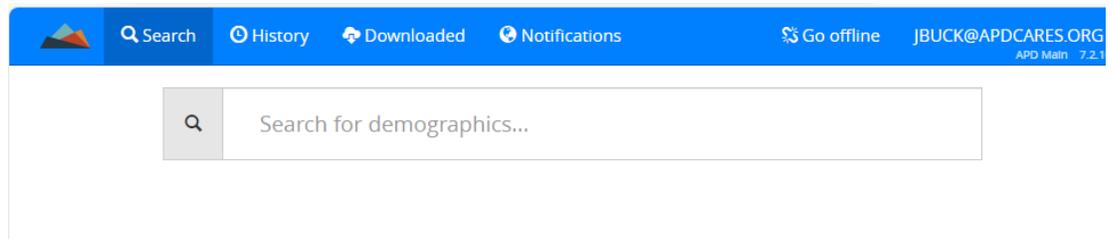


## Worker Portal

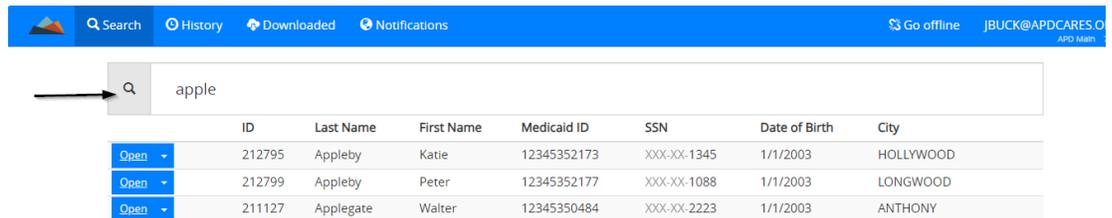
- The WellSky User Portal opens. Select Worker Portal.



- The search page displays.



- 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.*

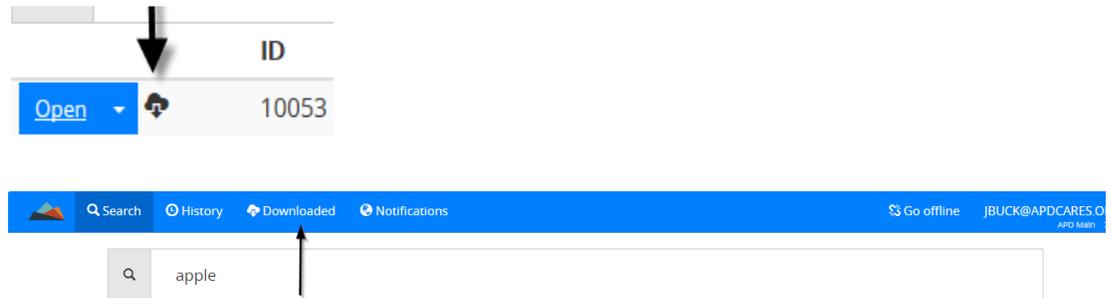
- When the search results appear, select on the **flyout menu** beside the Open option and then select **Make Available Offline**.

## Worker Portal

The screenshot shows the Worker Portal interface with a search bar containing 'apple'. Below the search bar is a table of client records. The table has columns for ID, Last Name, First Name, Medicaid ID, SSN, Date of Birth, and City. There are four 'Open' buttons in the first column, each with a dropdown arrow. A mouse cursor is hovering over the 'Open' button for the client with ID 215446. A context menu is visible, showing options: 'New Assessment' and 'Make Available Offline'. An arrow points from the text 'Make Available Offline' in the instructions below to this menu option.

	ID	Last Name	First Name	Medicaid ID	SSN	Date of Birth	City
Open	212795	Appleby	Katie	12345352173	XXX-XX-1345	1/1/2003	HOLLYWOOD
Open	212799	Appleby	Peter	12345352177	XXX-XX-1088	1/1/2003	LONGWOOD
Open	211127	Applegate	Walter	12345350484	XXX-XX-2223	1/1/2003	ANTHONY
Open	215446	Appleton	Consumer	123456789	XXX-XX-6789	1/1/1999	JACKSONVILLE
	07	Applewhite	Lawrence	12345353990	XXX-XX-4821	1/1/2003	PENSACOLA
	34	Applewhite	Rodney	12345353967	XXX-XX-1075	1/1/2003	NAPLES
	02	Applewhite	Teresa	12345353985	XXX-XX-5363	1/1/2003	SUMMERLAND KEY

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.

## Worker Portal



### 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.



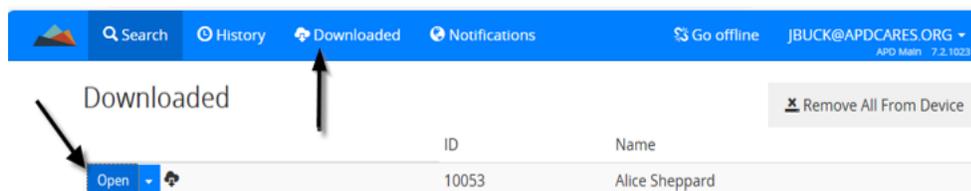
### Go offline

Are you sure you want to go offline? Only downloaded data will be accessible until you go back online.

Yes Cancel

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.

## Worker Portal

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	Open
	Last Updated: 4/19/2018;	Cancel
Review *	Initial	
Review Date *	5/3/2018	
Division *	APD	
Program	Enter Program	
Status *	Draft	

8. Select **Open**. The selected form is displayed.
9. Complete the fields in the form. See the [Working with the Form](#) section.



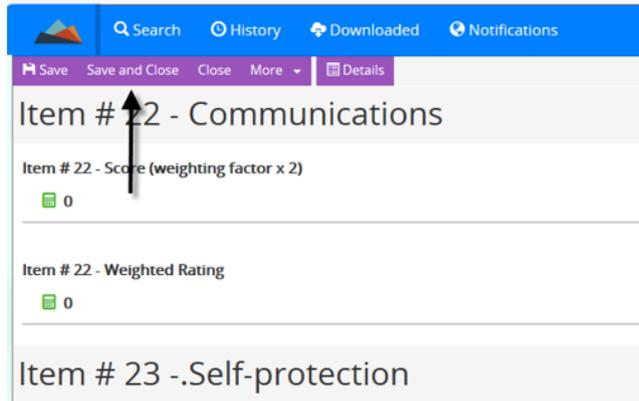
### CAUTION

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

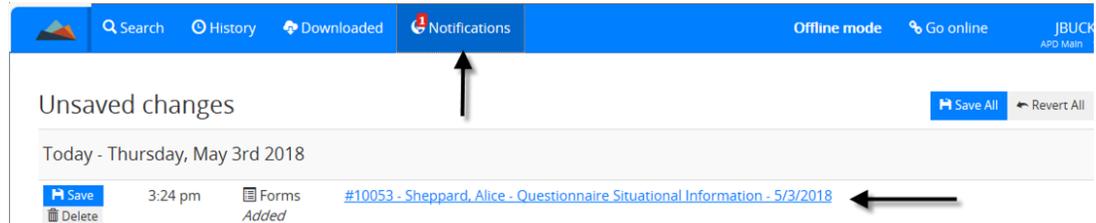
10. It is best practice to save your progress often. Select **Save** from the menu bar. A “Saved to Device Storage” message will display.

#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.

## Worker Portal

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.

The screenshot shows the 'Client Identification' section of the assessment form. The form is displayed on the left side of the screen, and a navigation pane is visible on the right. The navigation pane lists various sections, with 'Client Identification' highlighted. The form fields include:

- What is the participant's last name? required (Boone)
- What is the participant's first name? required (Jennifer)
- Enter the participant's telephone number. (171)140-6742

The navigation pane includes a search bar labeled 'Find Question...' and a list of sections: Basic NAPIS Intake, Client Identification, Contact Information, Directions to participant's home, Demographics, Activities of Daily Living (ADLs), and Instrumental Activities of Daily Living (IADLs). At the bottom of the navigation pane, there are navigation buttons: Go Back, Previous Unanswered, Previous Required, Go Forward, Next Unanswered, and Next Required.

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.

The screenshot shows the 'Directions to participant's home' section of the assessment form. The form is displayed on the left side of the screen, and a search bar is visible on the right. The search bar contains the keyword 'home'. The search results are shown below the search bar, listing the following results:

- Directions to participant's home
- Describe how to get to the participant's home
- During the past 7 days, and considering all episodes, how would you rate the participant's ability to perform WALKING IN HOME?

The navigation pane includes a search bar labeled 'Find Question Results:' and a list of search results. At the bottom of the navigation pane, there are navigation buttons: Go Back, Previous Unanswered, Previous Required, Go Forward, Next Unanswered, and Next Required.

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.

## Worker Portal

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.

## Worker Portal

-  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.

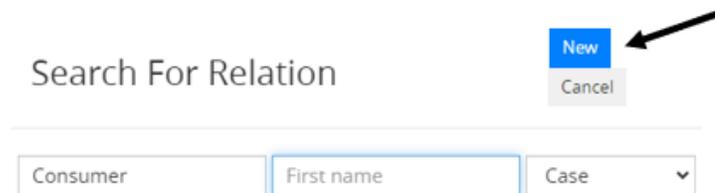
8. When adding Contacts to the forms, you may see the following buttons.



- Search – 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.

A screenshot of a 'Search For Relation' form. It has a title bar with 'Search For Relation' and a 'Cancel' button. Below the title bar are two text input fields: 'Last name' and 'First name'. To the right of these fields is a dropdown menu currently set to 'Family'. An arrow points to the dropdown menu, which is open, showing options: 'Family', 'Case', and 'Professional'. The 'Case' option is highlighted.

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

A screenshot of the 'Search For Relation' form after clicking 'New'. The form now has a 'Consumer' dropdown on the left, a 'First name' text input field in the middle, and a 'Case' dropdown on the right. Above the input fields, there are two buttons: a blue 'New' button and a grey 'Cancel' button. An arrow points to the 'New' button.

- 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:

<b>Site-wide shortcuts</b>		
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.
<b>Dialogs</b>		
Submit	enter	Submit the dialog.
Cancel	esc	Cancel the dialog.
<b>Forms</b>		
Save	ctrl+s	Save the record.
Close	ctrl+e	Close the record.
Revert	ctrl+u	Revert all unsaved changes.
<b>Assessment</b>		
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")

A screenshot of a form field for 'Status \*'. The dropdown menu is open, showing the following options: 'Draft', 'Enter Status', 'Draft', 'Open', 'Pending', 'Complete', 'Submitted', and 'Assigned'. The 'Open' and 'Complete' options are circled in red. An arrow points to the 'Status \*' label.

Proceed to [Synchronize the Form](#)

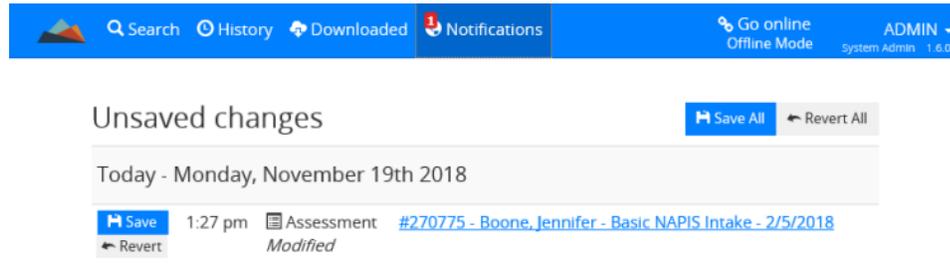
## Synchronize the Form

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

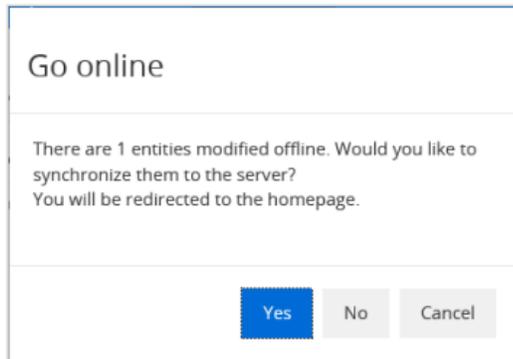
## Worker Portal

synchronized, the Notifications tab will include a red icon that shows the number of records that are out of sync.

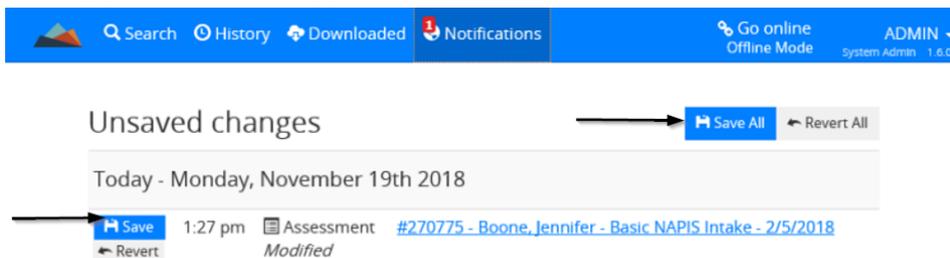


3. The Worker Portal should prompt you automatically to synchronize to the server or do it automatically the next time you are online.

*Note: If this doesn't occur automatically, click the "Go online" and it will push synchronization.*

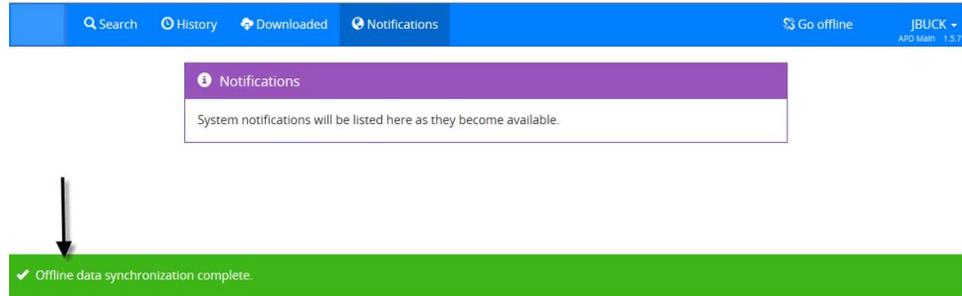


4. If not, select on **Save All** or individually **Save**, to copy the form(s) to iConnect application.



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

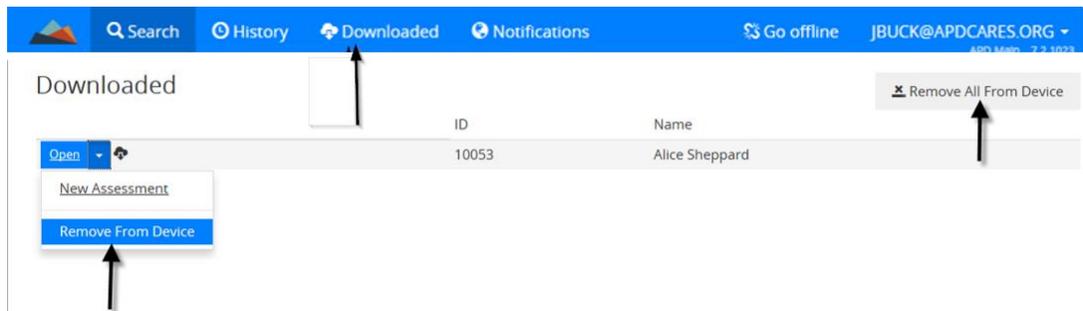
## Worker Portal



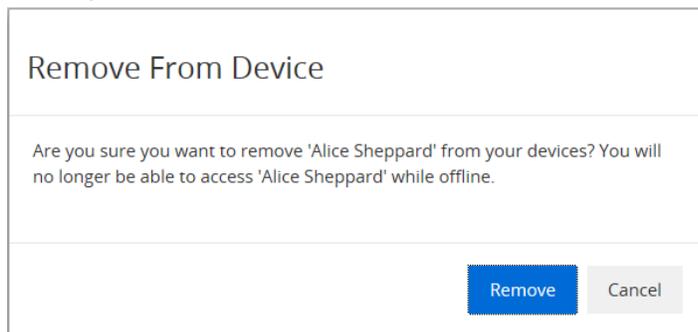
### Remove Records from Device

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.



## Worker Portal

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