

Utilizing Notes in iConnect

Introduction

Notes in iConnect are a way for Providers, WSCs and APD staff to communicate and share information while keeping records in either the Provider Record or the Consumer Record. Depending on the workflow, there are specific Note Types, Note Sub-Types, Descriptions, Status, Attachments and Recipients required.

This job aid will encompass the basic skills in using the Note function in iConnect. It is important to visit the appropriate Chapters or Job Aids for the specific tasks and workflows to ensure you use the appropriate responses in the fields.

Objective of this job aid: to understand the importance of using Notes in iConnect and the importance of utilizing the appropriate response in the corresponding field options.

Specific Workflows that use Notes in iConnect:

[Behavior](#)

[Employment Services - IFS](#)

[Expansion Requests](#)

[Home Health Care Services \(HHCS\)](#)

[ICF Transitions](#)

[Life Skills Development](#)

[Quality Assurance](#)

[Reactive Strategies](#)

[Residential Habilitation](#)

[Residential Planning](#)

[Supply, Equipment, Adaptation, Emergency Response System and Dental](#)

[Supported Living](#)

[Therapeutic and Residential Nursing](#)

[Waiver Support Coordination \(WSC\)](#)

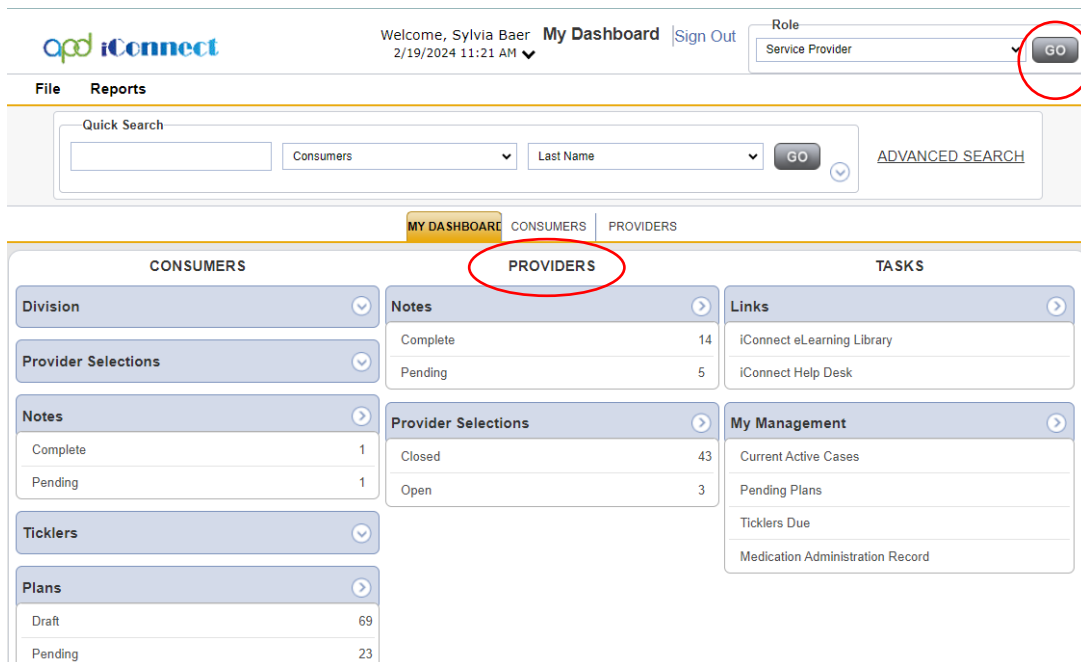
Note Locations in iConnect – Provider Record

Your Role in iConnect will determine your access.

- The Service Provider Role will have access to both the Provider Notes and Consumer Notes.
- WSCs, Service Provider Workers and Provider EVV Managers will only have access to the Consumer’s Notes.

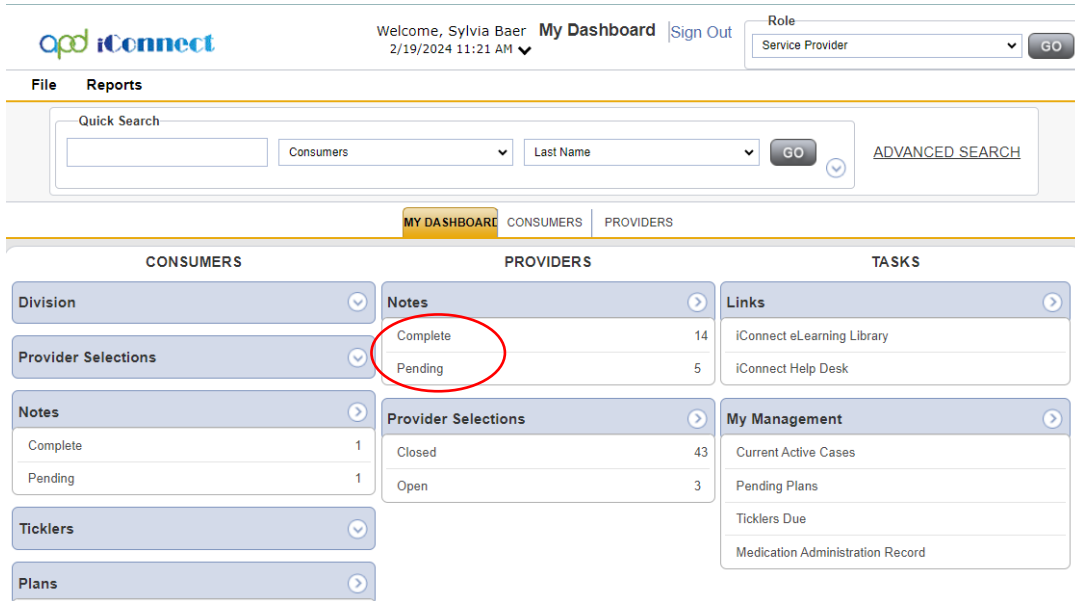
1. To begin, log into iConnect and set Role = **Service Provider**. Click **Go**. When you land on **My Dashboard**, you will see columns labeled CONSUMERS and PROVIDERS. Under those corresponding columns are Notes. Notes under the CONSUMERS heading are Notes that were created on the Consumer Record and are part of that consumer’s central record. Notes under the Provider Record are notes that were created in the Provider Record and are part of the Provider’s record. *If you do not see the heading labeled Notes, that indicates that you do not have any Unread Notes.*

a. It is important to remember that consumer case management related notes should not be included within the provider record and vice versa. Follow the appropriate workflows for plans of remediation and corrective action plans.



The screenshot shows the iConnect 'My Dashboard' for a user named Sylvia Baer. The role is set to 'Service Provider'. The dashboard is divided into three main sections: CONSUMERS, PROVIDERS (circled in red), and TASKS. The PROVIDERS section includes a 'Notes' table with 14 Complete and 5 Pending notes, and a 'Provider Selections' table with 43 Closed and 3 Open selections. The CONSUMERS section includes a 'Notes' table with 1 Complete and 1 Pending note, and a 'Plans' table with 69 Draft and 23 Pending plans. The TASKS section includes a 'My Management' table with Current Active Cases, Pending Plans, Ticklers Due, and Medication Administration Record.

- To view either Complete Notes or Pending Notes, click the corresponding hyperlink.



Welcome, Sylvia Baer | My Dashboard | Sign Out | 2/19/2024 11:21 AM | Role: Service Provider

File Reports

Quick Search: [] Consumers [v] Last Name [v] GO [v] ADVANCED SEARCH

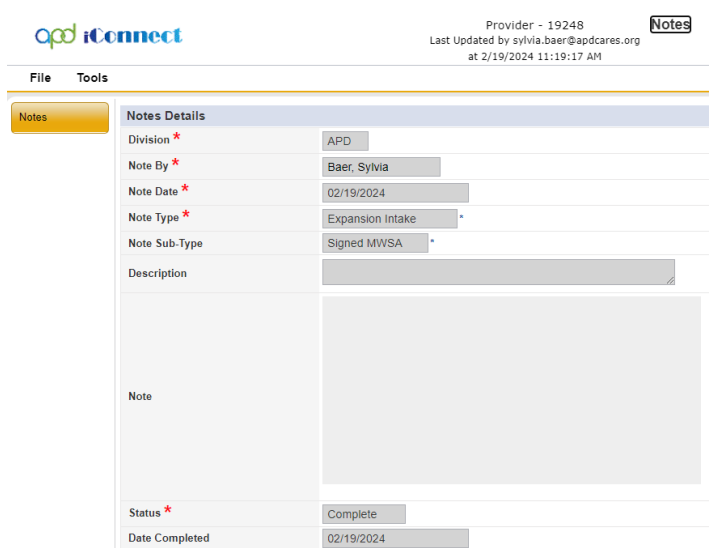
MY DASHBOARD CONSUMERS PROVIDERS

CONSUMERS	PROVIDERS	TASKS
Division [v] Provider Selections [v] Notes [v] Complete 1 Pending 1 Ticklers [v] Plans [v]	Notes [v] Complete 14 Pending 5 Provider Selections [v] Closed 43 Open 3	Links [v] iConnect eLearning Library iConnect Help Desk My Management [v] Current Active Cases Pending Plans Ticklers Due Medication Administration Record

- Click the hyperlink of the Note you want to read. The Note will show once selected.

14 My Dashboard Notes record(s) returned - now viewing 1 through 14

Provider	Note Type	Note Date	Description	Author	Status
Provider - 19166	Other	08/19/2022	19166 scavenger hunt	Worker_19166.Training	Complete
Provider - 19167	Other	08/19/2022	APD iConnect Scavenger Hunt - 19167	Worker_19167.Training	Complete
Provider - 19217	Other	08/09/2022	APD iConnect Scavenger Hunt worker_19217	Worker_19217.Training	Complete
Provider - 19217	Other	08/10/2022	APD iConnect Scavenger Hunt worker_19217	Worker_19217.Training	Complete
Provider - 19220	Other	08/11/2022	WORKER_19220	Worker_19220.Training	Complete
Provider - 19221	Other	09/27/2022	APD iConnect Scavenger Hunt - worker_19221	Worker_19221.Training	Complete
Provider - 19222	Other	08/11/2022	APD iConnect Scavenger Hunt - worker_19222	Worker_19222.Training	Complete
Provider - 19223	Other	08/11/2022	apd iconnect scavenger hunt 19223	Worker_19223.Training	Complete
Provider - 19226	Other	08/11/2022	ADP iConnect Scavenger Hunt -19226	Worker_19226.Training	Complete
Provider - 19226	Other	08/11/2022	APD iConnect Scavenger Hunt - 19226	Worker_19226.Training	Complete
Provider - 19232	Other	08/11/2022	APD iConnect Scavenger Hunt - 19232	Worker_19232.Training	Complete
Provider - 19248	Other	08/30/2022	APD iConnect Scavenger Hunt	Worker_19248.Training	Complete
Provider - 19248	Other	08/30/2022	APD iConnect Scavenger Hunt	Worker_19248.Training	Complete
Provider - 19248	Expansion Intake	02/19/2024		Baer, Sylvia	Complete



Provider - 19248 | Notes | Last Updated by sylvia.baer@apdcares.org at 2/19/2024 11:19:17 AM

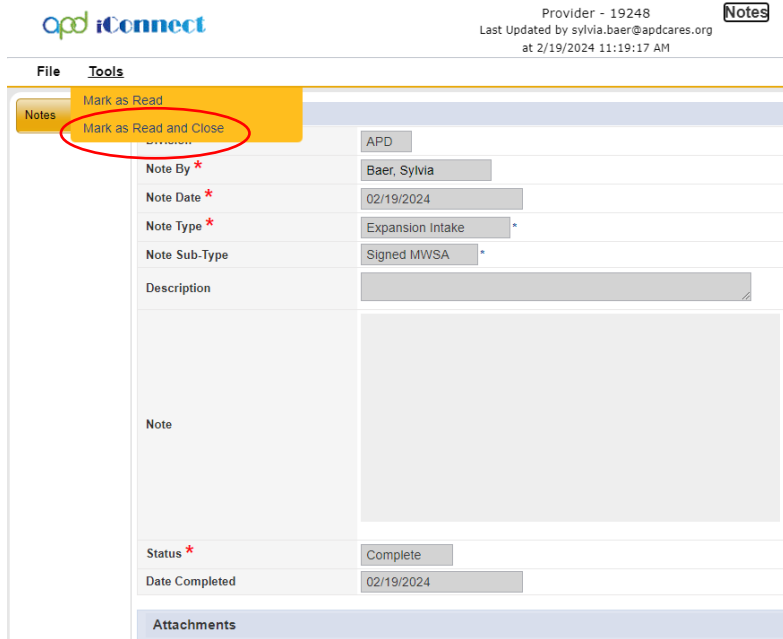
File Tools

Notes

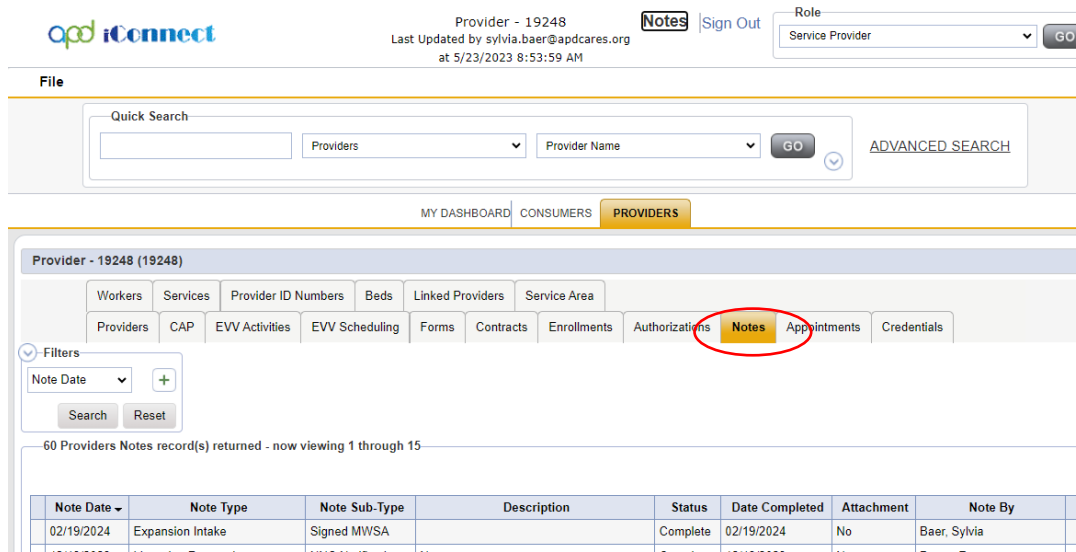
Notes Details

Division * APD
 Note By * Baer, Sylvia
 Note Date * 02/19/2024
 Note Type * Expansion Intake
 Note Sub-Type Signed MWSA
 Description
 Note
 Status * Complete
 Date Completed 02/19/2024

- To remove the Note from your My Dashboard, navigate to **Tools > Mark as Read and Close**.



To locate any Note from your Provider Record marked as Read, navigate to your **Provider Record > Notes** tab to view any previously Read Notes.

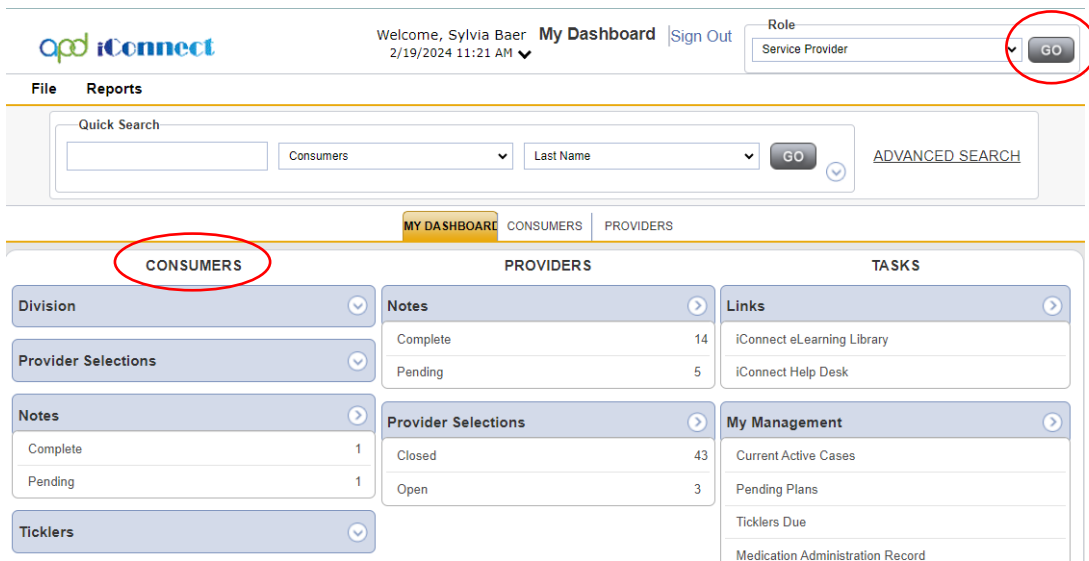


Note Locations in iConnect – Consumer Record

Your Role in iConnect will determine your access. Service Provider, WSC, Service Provider Worker and Provider EVV Manager will have access to the Consumer’s Notes.

- To begin, log into iConnect and set Role = **Service Provider, Service Provider Worker, or WSC**. Click **Go**. When you land on **My Dashboard**, you will see a column labeled CONSUMERS. Notes under the CONSUMERS heading are Notes that were created on the Consumer Record and are part of that consumer’s central record. *If you do not see the heading labeled Notes, that indicates that you do not have any Unread Notes.*

- It is important to remember that consumer case management related notes should not be included within the provider record and vice versa. Follow the appropriate workflows for plans of remediation and corrective action plans.*



Welcome, Sylvia Baer My Dashboard Sign Out Role: Service Provider GO

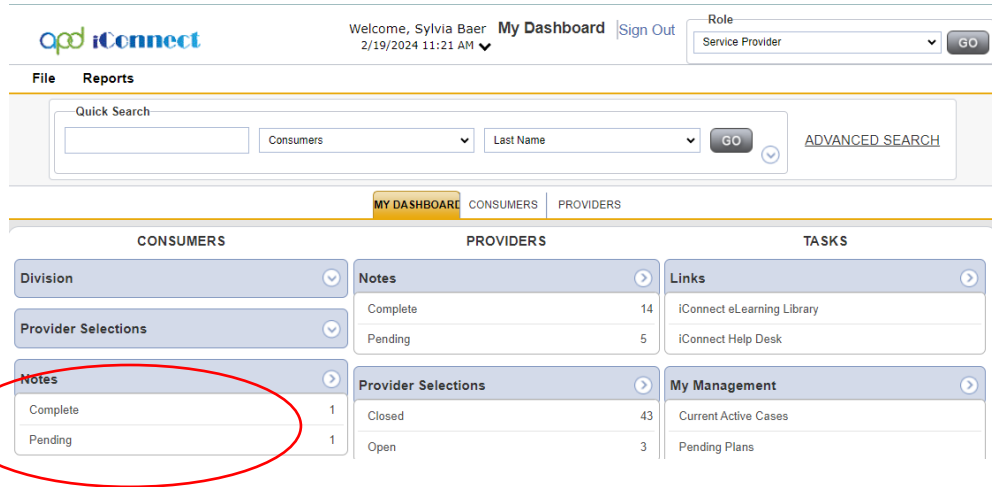
File Reports

Quick Search: [] Consumers Last Name GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS PROVIDERS

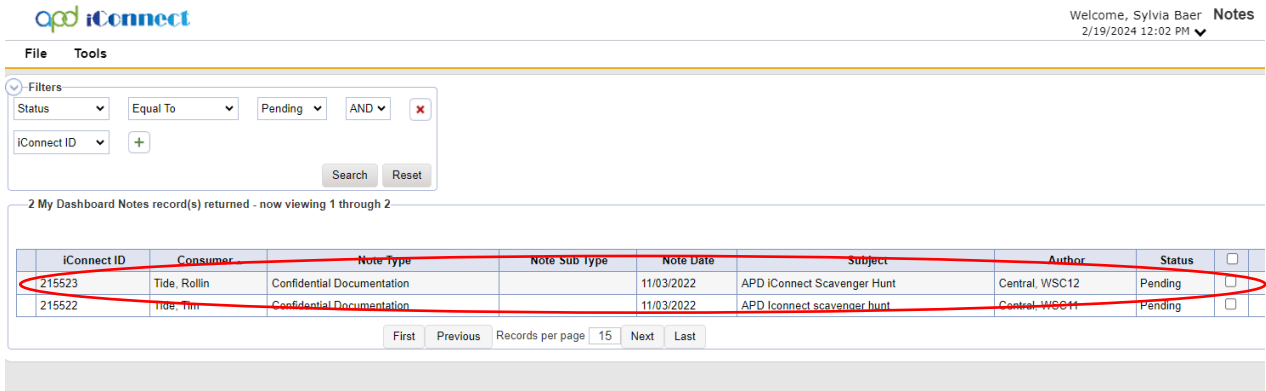
CONSUMERS	PROVIDERS	TASKS
Division [v] Provider Selections [v] Notes [v] Complete 1 Pending 1 Ticklers [v]	Notes [v] Complete 14 Pending 5 Provider Selections [v] Closed 43 Open 3	Links [v] iConnect eLearning Library iConnect Help Desk My Management [v] Current Active Cases Pending Plans Ticklers Due Medication Administration Record

- To view either Complete Notes or Pending Notes, click the corresponding hyperlink.



The screenshot shows the iConnect dashboard with the 'MY DASHBOARD' tab selected. Under the 'CONSUMERS' section, the 'Notes' dropdown menu is open, and the 'Complete' and 'Pending' options are circled in red. The dashboard also displays counts for 'Complete' (14) and 'Pending' (5) notes, and a 'Tasks' section with various links like 'iConnect eLearning Library' and 'iConnect Help Desk'.

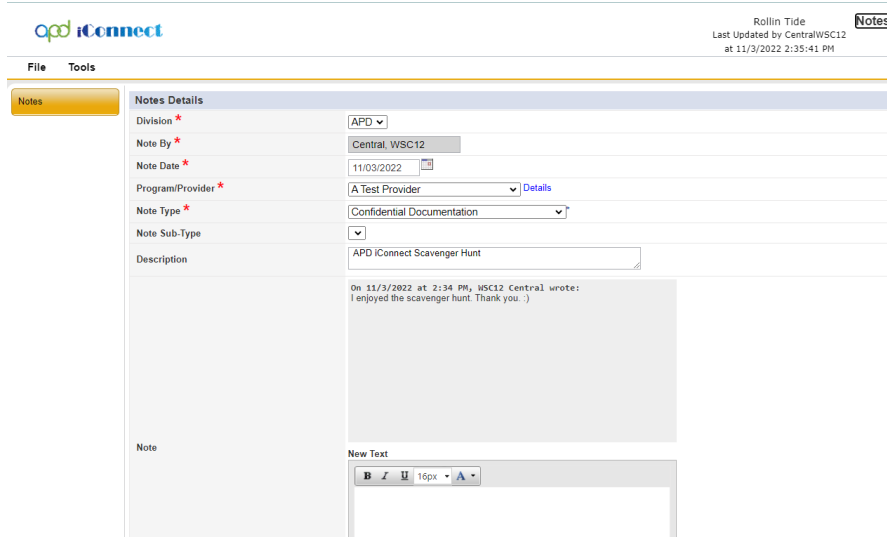
- Click the hyperlink of the Note you want to read. Once selected, your note will appear.



The screenshot shows the search results for notes. A filter is applied for 'Status: Pending'. Two records are returned:

iConnect ID	Consumer	Note Type	Note Sub Type	Note Date	Subject	Author	Status
215523	Tide, Rollin	Confidential Documentation		11/03/2022	APD iConnect Scavenger Hunt	Central, WSC12	Pending
215522	Tide, Tim	Confidential Documentation		11/03/2022	APD iConnect scavenger hunt	Central, WSC11	Pending

The first two rows of the table are circled in red. Below the table are navigation controls: 'First', 'Previous', 'Records per page: 15', 'Next', 'Last'.



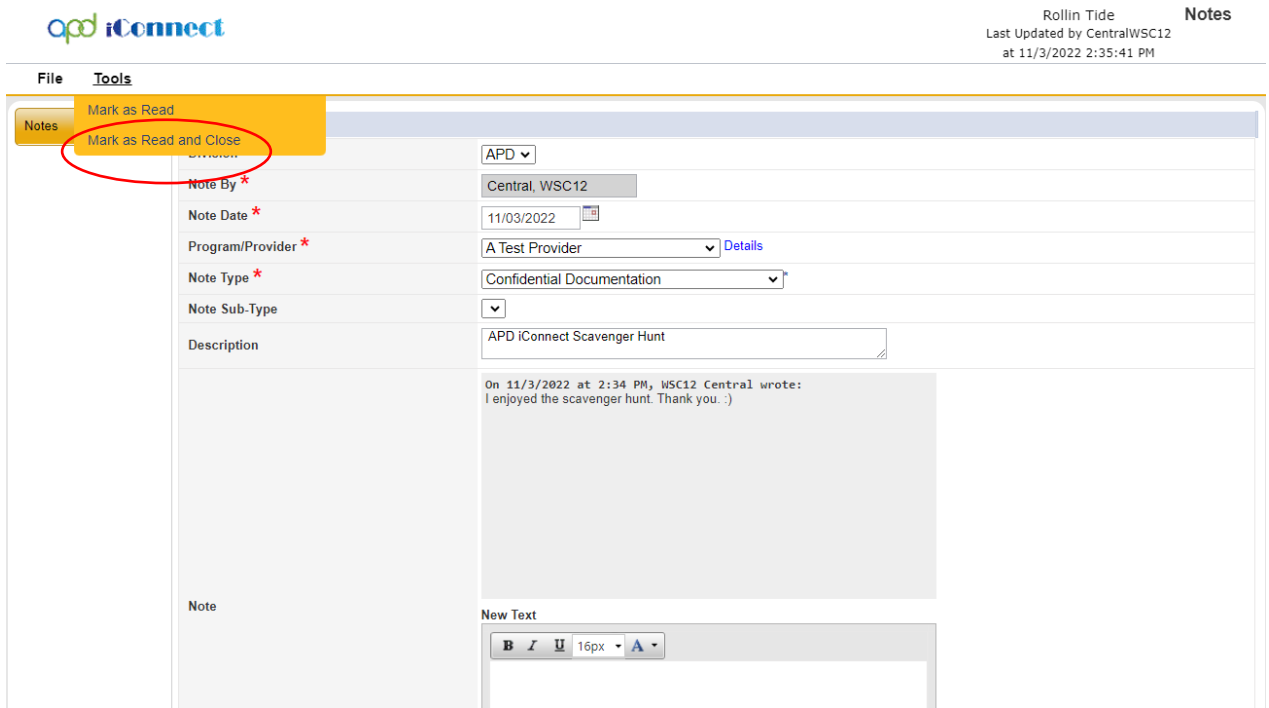
The screenshot shows the 'Notes Details' page for the selected note. The details are as follows:

- Division: APD
- Note By: Central, WSC12
- Note Date: 11/03/2022
- Program/Provider: A Test Provider
- Note Type: Confidential Documentation
- Note Sub-Type: (dropdown)
- Description: APD iConnect Scavenger Hunt

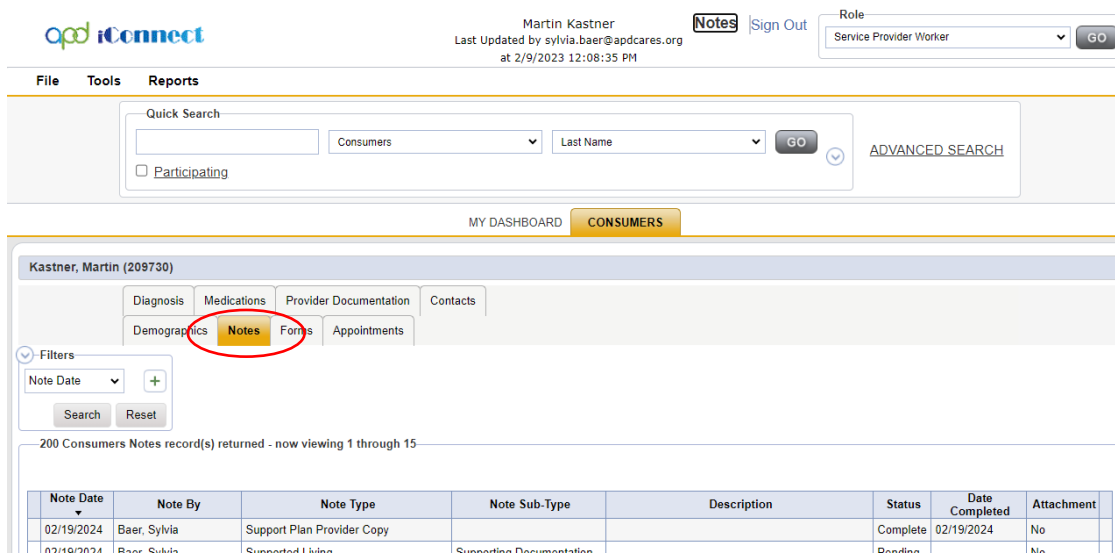
The 'Note' field contains the following text: "On 11/3/2022 at 2:34 PM, WSC12 Central wrote: I enjoyed the scavenger hunt. Thank you. :)"

Below the note is a 'New Text' editor with a rich text toolbar.

- To remove the Note from your My Dashboard, navigate to **Tools > Mark as Read and Close**. *If you mark a Support Plan or Support Plan Provider Copy Note as Read, you will no longer have access to that Note, therefore make sure to download that document prior to marking it as read OR leave it as unread for future access.*



*To locate a Note from the Consumer Record marked as Read, navigate to the **Consumer Record > Notes** tab to view any previously Read Notes. This will **NOT** work with Support Plan or Support Plan Provider Copy Note Types.*



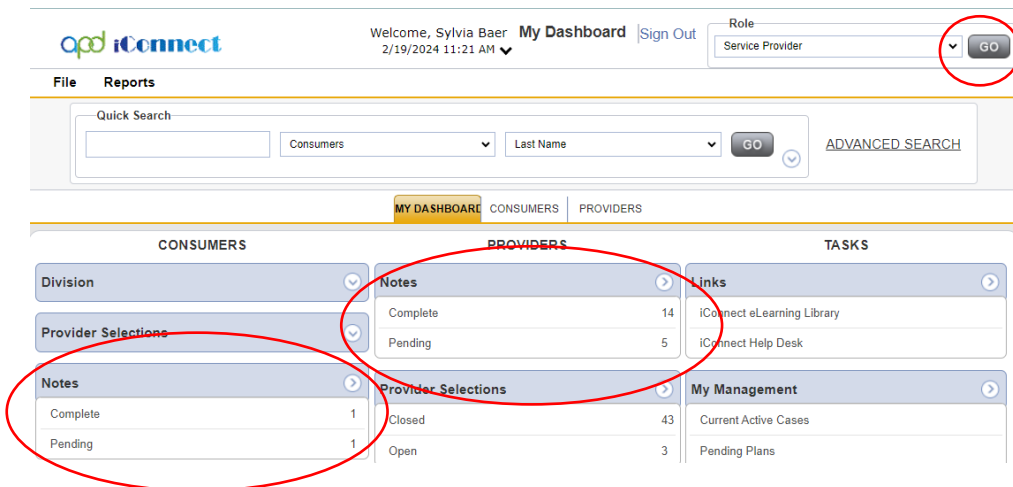
Creating a Note in iConnect

Notes are a way for service providers and WSCs to communicate with APD staff and each other through iConnect. It is crucial that if a Note is needed to be read by an individual that they are added as a Note Recipient. A Note without a Note Recipient is similar to an email in the Drafts folder, no one knows it is there. When creating Notes, it is imperative to follow the proper workflow to ensure that each step is followed. Utilizing the incorrect Note Type or Note Sub-Type could cause issues for the recipient, which could potentially jeopardize services for our consumers. Utilize the links provided earlier to ensure that you follow the appropriate workflow.

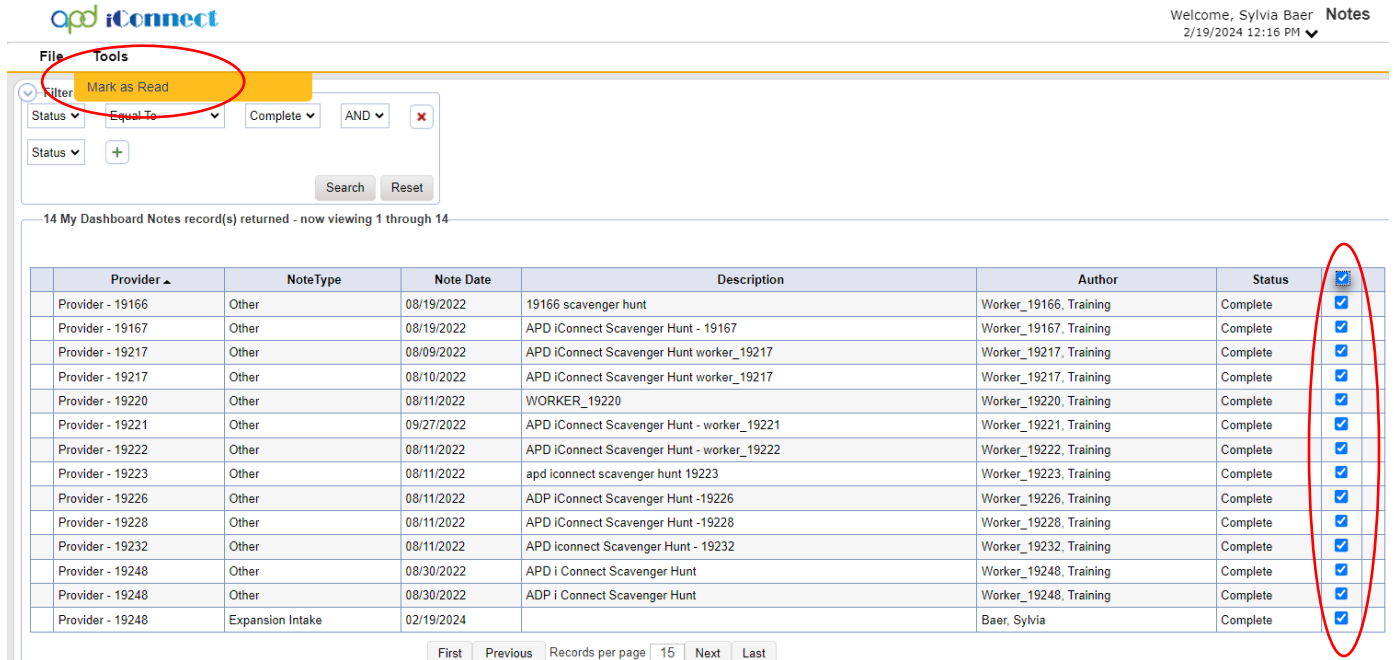
Best Practices with Notes in iConnect

There are some best practices to help ensure that all iConnect users are successful with iConnect.

1. Apart from the Support Plan Provider Copy Note and the Support Plan Notes (for Providers of Non-WSC services), it is best practice for ALL providers to mark Notes as Read to clear your My Dashboard.
 - a. Notes can also be marked as read from the list view of your Notes from your My Dashboard.
 - i. Once logged into iConnect, select your appropriate Role and press **Go**. On your My Dashboard, you will click the Notes you want to view (Providers/Consumers and Pending or Complete).



- ii. From the list grid view, you can check mark all or a few of the Notes from the right-hand side. Then navigate to **Tools > Mark as Read**.

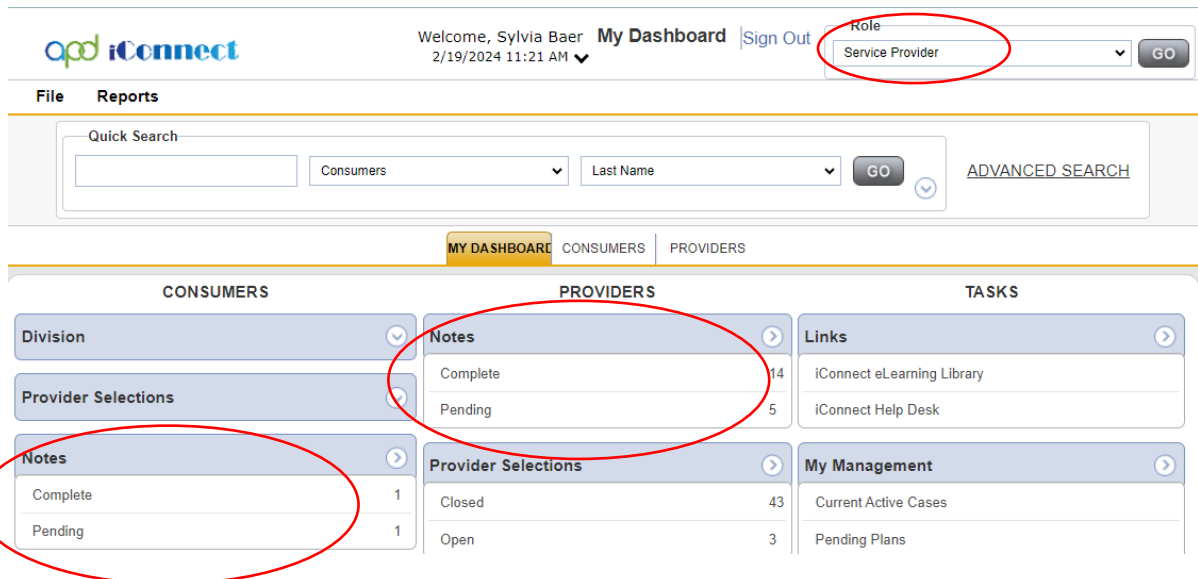


14 My Dashboard Notes record(s) returned - now viewing 1 through 14

Provider	NoteType	Note Date	Description	Author	Status	
Provider - 19166	Other	08/19/2022	19166 scavenger hunt	Worker_19166, Training	Complete	<input checked="" type="checkbox"/>
Provider - 19167	Other	08/19/2022	APD iConnect Scavenger Hunt - 19167	Worker_19167, Training	Complete	<input checked="" type="checkbox"/>
Provider - 19217	Other	08/09/2022	APD iConnect Scavenger Hunt worker_19217	Worker_19217, Training	Complete	<input checked="" type="checkbox"/>
Provider - 19217	Other	08/10/2022	APD iConnect Scavenger Hunt worker_19217	Worker_19217, Training	Complete	<input checked="" type="checkbox"/>
Provider - 19220	Other	08/11/2022	WORKER_19220	Worker_19220, Training	Complete	<input checked="" type="checkbox"/>
Provider - 19221	Other	09/27/2022	APD iConnect Scavenger Hunt - worker_19221	Worker_19221, Training	Complete	<input checked="" type="checkbox"/>
Provider - 19222	Other	08/11/2022	APD iConnect Scavenger Hunt - worker_19222	Worker_19222, Training	Complete	<input checked="" type="checkbox"/>
Provider - 19223	Other	08/11/2022	apd iconnect scavenger hunt 19223	Worker_19223, Training	Complete	<input checked="" type="checkbox"/>
Provider - 19226	Other	08/11/2022	ADP iConnect Scavenger Hunt -19226	Worker_19226, Training	Complete	<input checked="" type="checkbox"/>
Provider - 19228	Other	08/11/2022	APD iConnect Scavenger Hunt -19228	Worker_19228, Training	Complete	<input checked="" type="checkbox"/>
Provider - 19232	Other	08/11/2022	APD iconnect Scavenger Hunt - 19232	Worker_19232, Training	Complete	<input checked="" type="checkbox"/>
Provider - 19248	Other	08/30/2022	APD i Connect Scavenger Hunt	Worker_19248, Training	Complete	<input checked="" type="checkbox"/>
Provider - 19248	Other	08/30/2022	ADP i Connect Scavenger Hunt	Worker_19248, Training	Complete	<input checked="" type="checkbox"/>
Provider - 19248	Expansion Intake	02/19/2024		Baer, Sylvia	Complete	<input checked="" type="checkbox"/>

b. Notes can also be marked as read from the opened Note.

- i. Once logged into iConnect, select your appropriate Role and press **Go**. On your My Dashboard, you will click the Notes you want to view (Providers/Consumers and Pending or Complete).



Welcome, Sylvia Baer My Dashboard Sign Out

 2/19/2024 11:21 AM

 Role: Service Provider GO

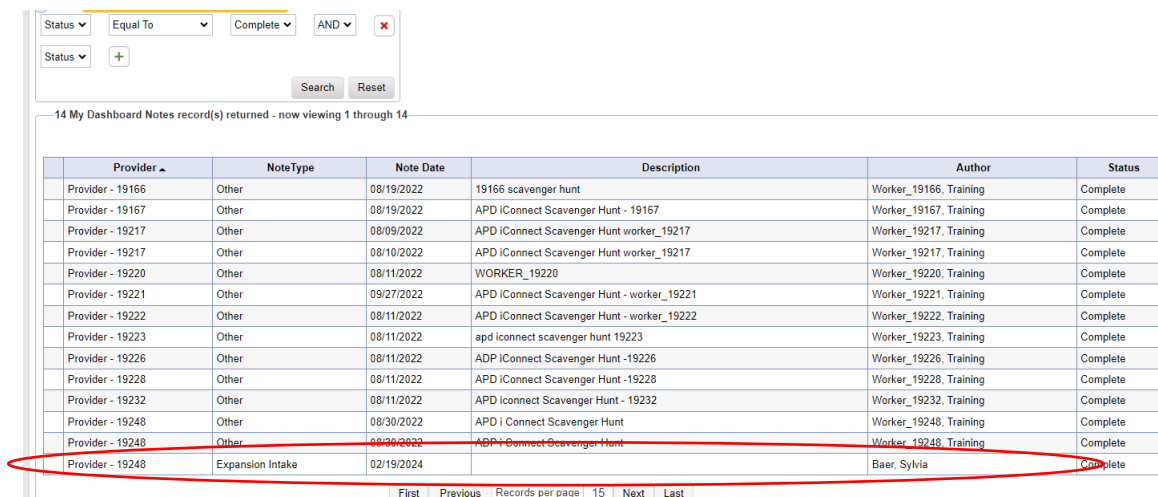
File Reports

 Quick Search: [] Consumers Last Name [] GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS PROVIDERS

CONSUMERS	PROVIDERS	TASKS
Division [v] Provider Selections [v]	Notes [v] Complete 14 Pending 5	Links [v] iConnect eLearning Library iConnect Help Desk
Notes [v] Complete 1 Pending 1	Provider Selections [v] Closed 43 Open 3	My Management [v] Current Active Cases Pending Plans

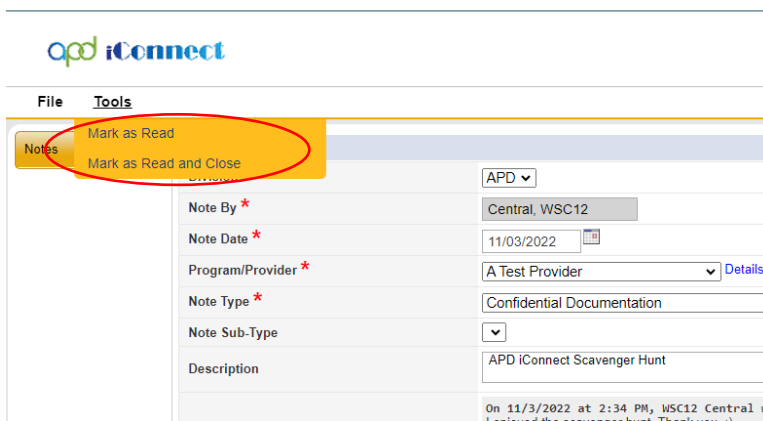
ii. Select the Note you want to view.



14 My Dashboard Notes record(s) returned - now viewing 1 through 14

Provider	Note Type	Note Date	Description	Author	Status
Provider - 19166	Other	08/19/2022	19166 scavenger hunt	Worker_19166, Training	Complete
Provider - 19167	Other	08/19/2022	APD iConnect Scavenger Hunt - 19167	Worker_19167, Training	Complete
Provider - 19217	Other	08/09/2022	APD iConnect Scavenger Hunt worker_19217	Worker_19217, Training	Complete
Provider - 19217	Other	08/10/2022	APD iConnect Scavenger Hunt worker_19217	Worker_19217, Training	Complete
Provider - 19220	Other	08/11/2022	WORKER_19220	Worker_19220, Training	Complete
Provider - 19221	Other	09/27/2022	APD iConnect Scavenger Hunt - worker_19221	Worker_19221, Training	Complete
Provider - 19222	Other	08/11/2022	APD iConnect Scavenger Hunt - worker_19222	Worker_19222, Training	Complete
Provider - 19223	Other	08/11/2022	apd iconnect scavenger hunt 19223	Worker_19223, Training	Complete
Provider - 19226	Other	08/11/2022	ADP iConnect Scavenger Hunt -19226	Worker_19226, Training	Complete
Provider - 19228	Other	08/11/2022	APD iConnect Scavenger Hunt -19228	Worker_19228, Training	Complete
Provider - 19232	Other	08/11/2022	APD iconnect Scavenger Hunt - 19232	Worker_19232, Training	Complete
Provider - 19248	Other	08/30/2022	APD i Connect Scavenger Hunt	Worker_19248, Training	Complete
Provider - 19248	Other	08/30/2022	ADP i Connect Scavenger Hunt	Worker_19248, Training	Complete
Provider - 19248	Expansion Intake	02/19/2024		Baer, Sylvia	Complete

iii. Then navigate to **Tools > Mark as Read or Mark as Read and Close.**



APD iConnect

File Tools

Notes

- Mark as Read
- Mark as Read and Close

APD

Note By * Central, WSC12

Note Date * 11/03/2022

Program/Provider * A Test Provider Details

Note Type * Confidential Documentation

Note Sub-Type

Description APD iConnect Scavenger Hunt

On 11/3/2022 at 2:34 PM, WSC12 Central wr
Entered the scavenger hunt. Thank you :)

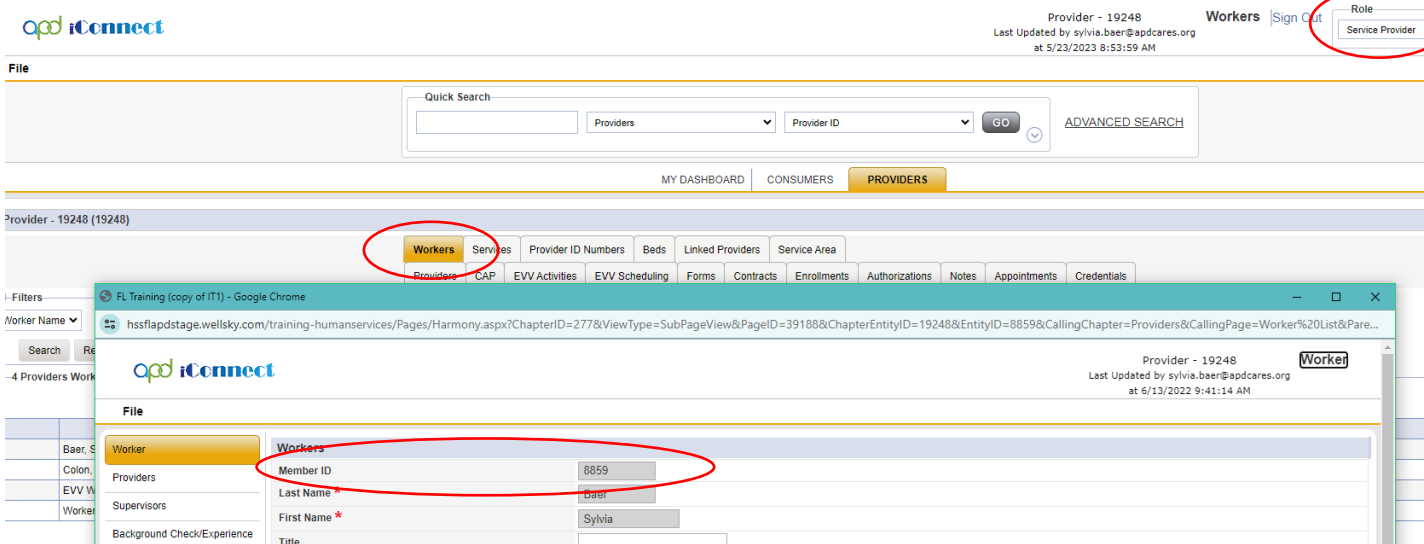
2. Ensure the correct Note Recipient.

- a. If you see that there are two individuals with the same name when searching for the worker as a Note Recipient, reach out to the individual and inquire into the Member ID.

688	Smith, Jessica
5135	Smith, Jessica

- b. To find your Member ID, the Service Provider (Owner) can go to their **Provider Record > Workers** and select the Worker's name. The screen will show their Member ID for their agency. (Workers will have a different Member ID for each Agency they work for.)

- C. **PRO TIP: The Service Provider (Owner) can edit the title for their employee in order to ensure that the worker can be easily identified as an employee for their organization.**



Provider - 19248
 Last Updated by sylvia.baer@apdcares.org at 5/23/2023 8:53:59 AM

Workers | Sign Out | Role: Service Provider

Quick Search: [] Providers [] Provider ID [] GO [] ADVANCED SEARCH

MY DASHBOARD | CONSUMERS | PROVIDERS

Provider - 19248 (19248)

Workers | Services | Provider ID Numbers | Beds | Linked Providers | Service Area

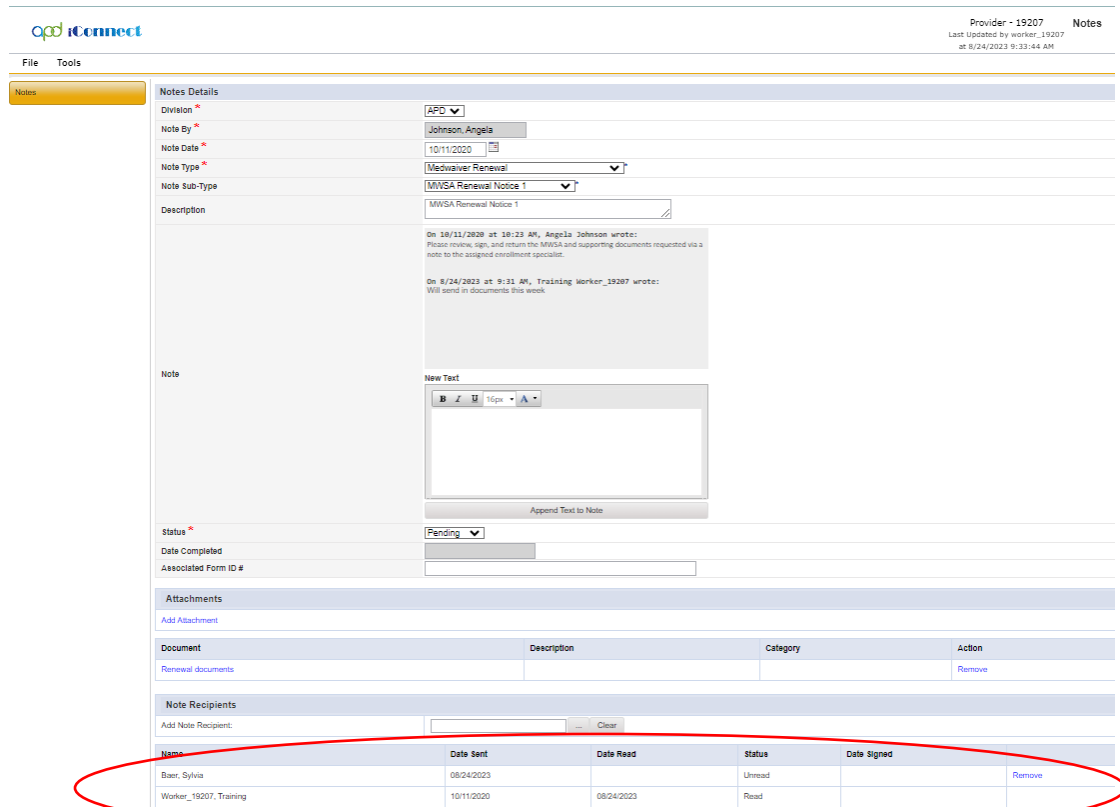
Provider - 19248
 Last Updated by sylvia.baer@apdcares.org at 6/13/2022 9:41:14 AM

Member ID: 8859

Last Name: Baer
 First Name: Sylvia

3. Verify if a Note Recipient has “Read” the Note to determine if they need to be added again.

- a. Navigate to the Note you want to verify. Then scroll down to see the Note Recipients.



Provider - 19207
 Last Updated by worker_19207 at 8/24/2023 9:33:44 AM

Notes

Notes Details

Division: APD
 Note By: Johnson, Angela
 Note Date: 10/11/2020
 Note Type: Medwaiver Renewal
 Note sub-Type: MWSA Renewal Notice 1

Description:

 On 10/11/2020 at 10:23 AM, Angela Johnson wrote:

 Please review, sign, and return the MWSA and supporting documents requested via a note to the assigned enrollment specialist.

 On 8/24/2023 at 9:31 AM, Training Worker_19207 wrote:

 Will send in documents this week.

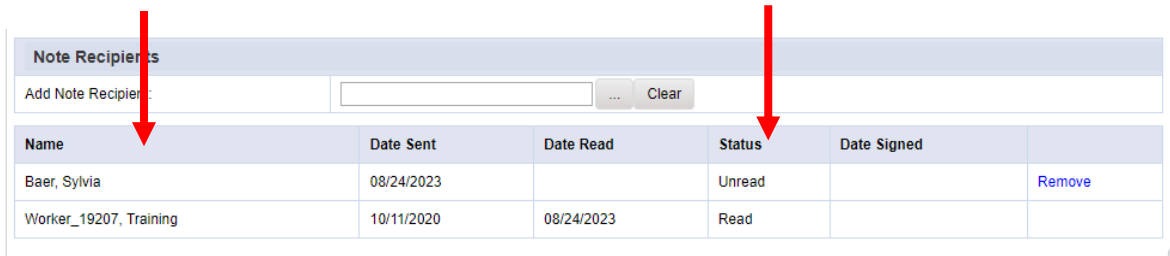
Status: Pending

Attachments

Document	Description	Category	Action
Renewal documents			Remove

Note Recipients

Name	Date Sent	Date Read	Status	Date Signed	
Baer, Sylvia	08/24/2023		Unread		Remove
Worker_19207, Training	10/11/2020	08/24/2023	Read		



Note Recipients					
Add Note Recipient		<input type="text"/>	...	Clear	
Name	Date Sent	Date Read	Status	Date Signed	
Baer, Sylvia	08/24/2023		Unread		Remove
Worker_19207, Training	10/11/2020	08/24/2023	Read		

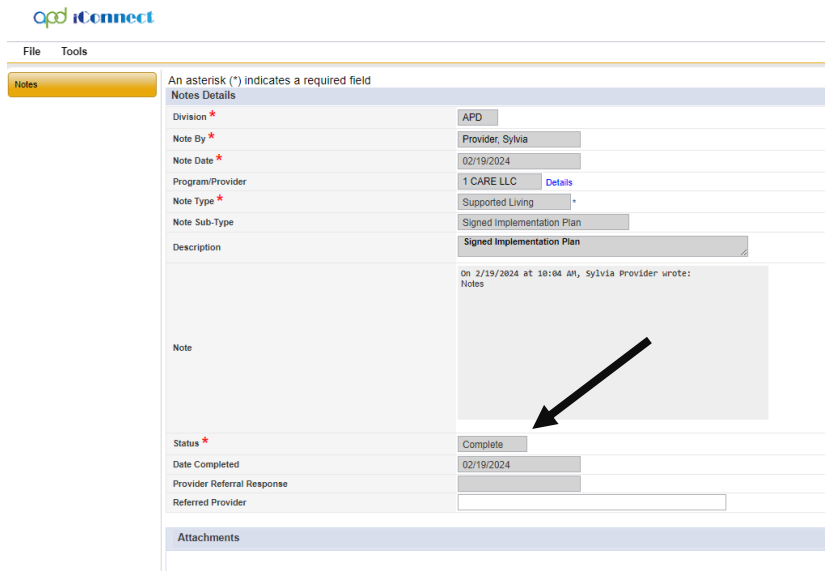
- b. If the Note is marked Unread, that means the Note is still on the recipient's My Dashboard. If the Note is marked Read, that means the Note is no longer on the recipient's My Dashboard. User will be able to resend the Note to that user if needed.
 - i. **Unread** – The Note is on the recipient's My Dashboard.
 - ii. **Read** – The Note is no longer on the recipient's My Dashboard.

Troubleshooting

There are times when things do not go as planned. This section will help you to determine why there might be issues with the Notes in iConnect.

1. Not getting a response to the Note I sent, or I was told I was added to a Note and I don't see it.
 - a. Incorrect Recipient- Check the name of the recipients and determine if the name was incorrect or if they have a different Member ID number. [Reference Best Practices with Notes in iConnect Number 2.](#)
 - b. Verify that the correct Note Type and Note Sub-Type was used in the workflow. (Not all providers have access to the same Note Types and Note Sub-Types.)
 - c. Verify the Note was done on the proper Record. For example: If a Provider sent a Note to a WSC from the Provider Record, the WSC would not have access to that Note, since it is not part of the Consumer Record.

2. I am unable to respond to a Note or I was informed that a recipient was not able to respond to my Note that I sent.
 - a. Check the Status of the Note. Notes in Complete status can no longer be edited. To change the Status of a Complete Note, a ticket request must be done. Not all Notes are allowed to be reversed and a New Note may need to be done.



An asterisk (*) indicates a required field

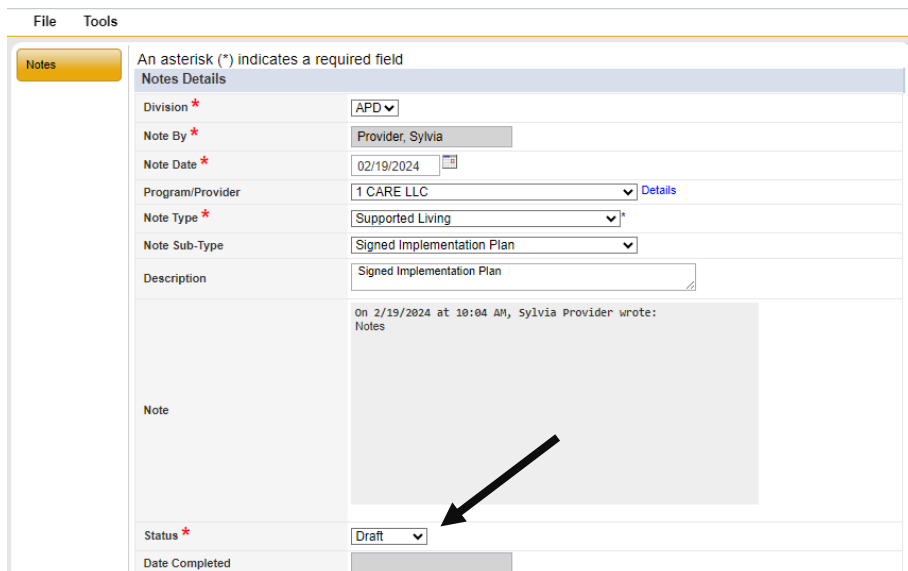
Notes

Notes Details

Division *	APD
Note By *	Provider, Sylvia
Note Date *	02/19/2024
Program/Provider	1 CARE LLC Details
Note Type *	Supported Living
Note Sub-Type	Signed Implementation Plan
Description	Signed Implementation Plan
Note	<p>On 2/19/2024 at 10:04 AM, Sylvia Provider wrote: Notes</p>
Status *	Complete
Date Completed	02/19/2024
Provider Referral Response	
Referred Provider	

Attachments

- b. If the Note is in Draft Status, only the creator can respond to the Note. The creator will need to follow the appropriate workflow and change the status of the Note.



An asterisk (*) indicates a required field

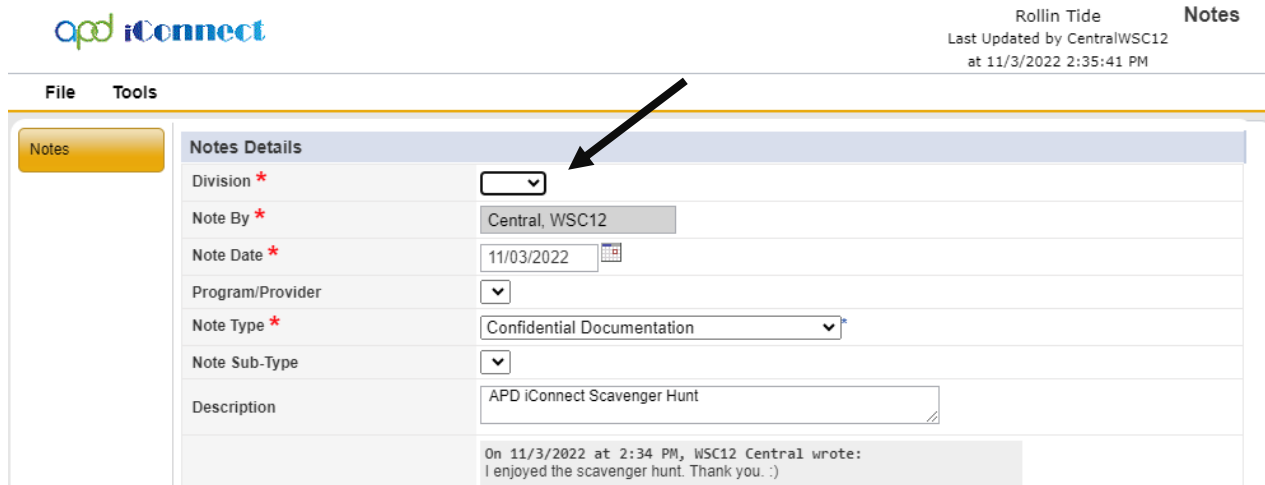
Notes

Notes Details

Division *	APD
Note By *	Provider, Sylvia
Note Date *	02/19/2024
Program/Provider	1 CARE LLC Details
Note Type *	Supported Living
Note Sub-Type	Signed Implementation Plan
Description	Signed Implementation Plan
Note	<p>On 2/19/2024 at 10:04 AM, Sylvia Provider wrote: Notes</p>
Status *	Draft
Date Completed	

3. I am not able to Save the Note I am creating.

- a. If you are not able to Save due to the Division not populating, contact your Regional iConnect Trainer.



Rollin Tide
 Last Updated by CentralWSC12
 at 11/3/2022 2:35:41 PM

File Tools

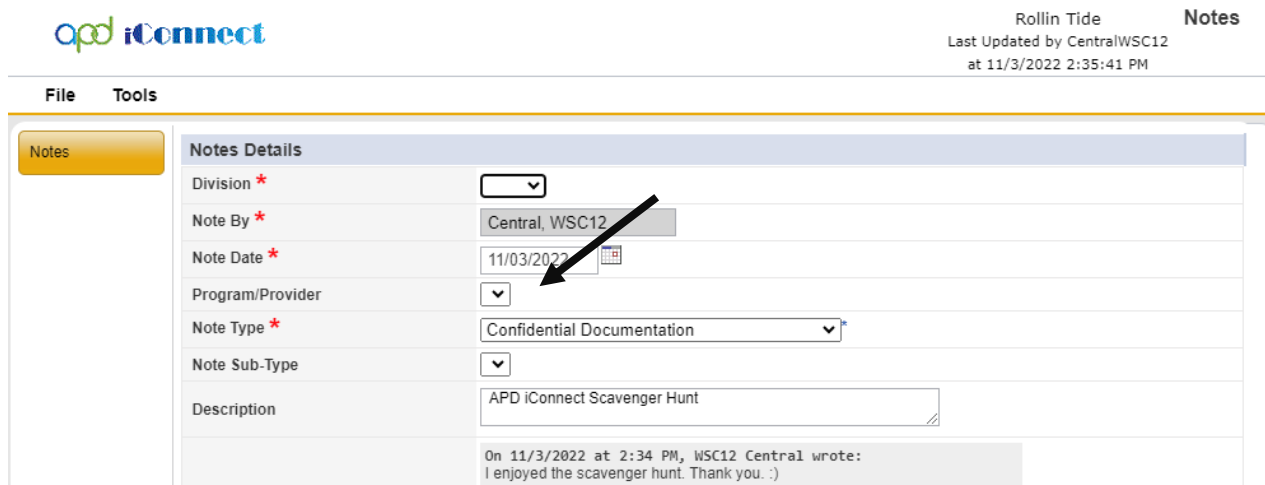
Notes

Notes Details

Division *	<input type="text"/>
Note By *	Central, WSC12
Note Date *	11/03/2022
Program/Provider	<input type="text"/>
Note Type *	Confidential Documentation
Note Sub-Type	<input type="text"/>
Description	APD iConnect Scavenger Hunt

On 11/3/2022 at 2:34 PM, WSC12 Central wrote:
 I enjoyed the scavenger hunt. Thank you. :)

- b. If you are not able to Save due to the Program/Provider not showing your Agency, contact the WSC and asked to be added to the Provider Selection Tab of the Consumer's Record.



Rollin Tide
 Last Updated by CentralWSC12
 at 11/3/2022 2:35:41 PM

File Tools

Notes

Notes Details

Division *	<input type="text"/>
Note By *	Central, WSC12
Note Date *	11/03/2022
Program/Provider	<input type="text"/>
Note Type *	Confidential Documentation
Note Sub-Type	<input type="text"/>
Description	APD iConnect Scavenger Hunt

On 11/3/2022 at 2:34 PM, WSC12 Central wrote:
 I enjoyed the scavenger hunt. Thank you. :)