

Adding a Legal Representative and Client Advocate in iConnect

Introduction

The Agency for Persons with Disabilities (APD) maintains client’s Legal Representative and Client Advocate information through the Contacts tab in iConnect. Pursuant to the Developmental Disabilities iBudget Waiver Handbook, Rule 59G-13.070, F.A.C., Waiver Support Coordinators (WSCs), WSC Mentees and Consumer-Directed Care Plus (CDC+) Consultants are required to maintain accurate demographics for the client’s guardian advocate, and/or legal representative in iConnect.

Different forms of guardianship and representation carry different legal powers. If the client has a legal representative, advocate or guardian, the WSCs, WSC Mentees and CDC+ Consultants must add the documentation identifying the type of guardianship or representation to a Note in iConnect in the client’s record.

This job aid outlines the required contact type along with the required note to accompany the documentation.

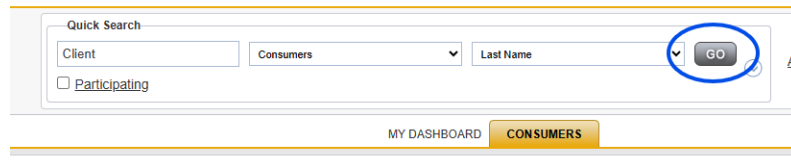
Types of Contacts:	Definition:
<p>Legal Representative</p> <ul style="list-style-type: none"> • Guardian • Guardian Advocate • Power of Attorney • Durable Power of Attorney • Parent (Parent of a Minor) • Medical Proxy 	<p>The most restrictive form of decision-making assistance, guardianship, as defined in Chapter. 744, Florida Statute, requires that an examining committee of three professionals, one of whom must be a physician, evaluates a person to determine their level of capacity. If a person is determined to be incapacitated, a lengthy and often expensive court process requires that a guardian and the incapacitated person, called a “ward,” participate in court proceedings to determine what decision-making rights, if any, the person can exercise without the assistance of a guardian. The guardian, who is appointed by the court, is required to retain an attorney for the duration of the guardianship and must report to the court annually, be subject to legal fees, and meet all the requirements for a guardian set forth in statute.</p>
<p>Client Advocate</p>	<p>A client advocate means a friend or relative of the client, or of the client’s immediate family, who advocates for the best interests of the client in any proceedings in which the client or his or her family has the right or duty to participate. Client advocates are not authorized to make decisions on behalf of a client and are not allowed access to HIPAA-protected information without a valid release under 45 CFR 164.508(c).</p>

Adding a Legal Representative Contact and Note

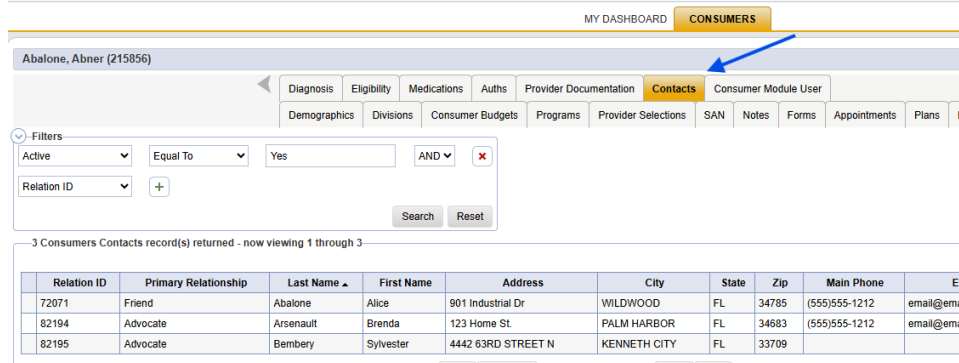
- To begin, log into iConnect and set Role to **WSC/CDC** or **WSC Mentee**. Click **Go**.



- Navigate to the Consumer record utilizing the Quick Search.

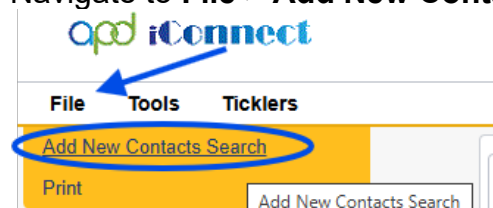


- Click the **Contacts** tab
 - If the Contact exists in the list view grid, click the contact and proceed to step 5.
 - If the Contact does not exist in the list view grid proceed to step 4.

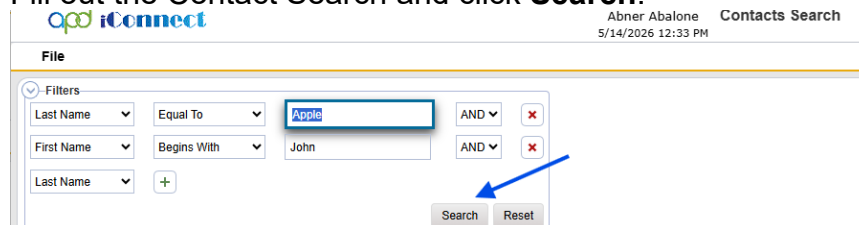


Relation ID	Primary Relationship	Last Name	First Name	Address	City	State	Zip	Main Phone	Email
72071	Friend	Abalone	Alice	901 Industrial Dr	WILDWOOD	FL	34785	(555)555-1212	email@ema
82194	Advocate	Arsenault	Brenda	123 Home St	PALM HARBOR	FL	34683	(555)555-1212	email@ema
82195	Advocate	Bembery	Sylvester	4442 63RD STREET N	KENNETH CITY	FL	33709		

- Navigate to **File > Add New Contacts Search**.



- Fill out the Contact Search and click **Search**.



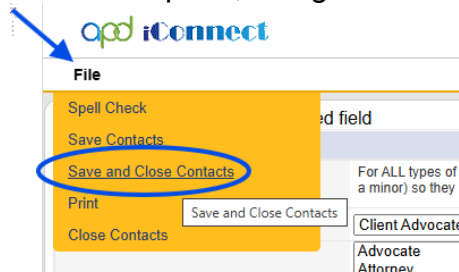
6. View any records returned.
 - a. If record listed is the correct contact click the contact and proceed to step 7.
 - b. If there are no records returned or the listed contacts are not correct, click **Add New**.

The screenshot shows the iConnect search interface. At the top left is the 'apd iConnect' logo. Below it is a 'File' header. A 'Filters' section is expanded, showing two filter rows. The first row has 'Last Name' set to 'Equal To' with the value 'Apple'. The second row has 'First Name' set to 'Begins With' with the value 'John'. Both rows have 'AND' logic and a red 'x' to remove the filter. Below the filters is a third row with 'Last Name' and a '+' sign to add more filters. At the bottom right of the filter area are three buttons: 'Search', 'Reset', and 'Add New'. The 'Add New' button is circled in blue. Below the filter area, it says '0 record(s) returned'.

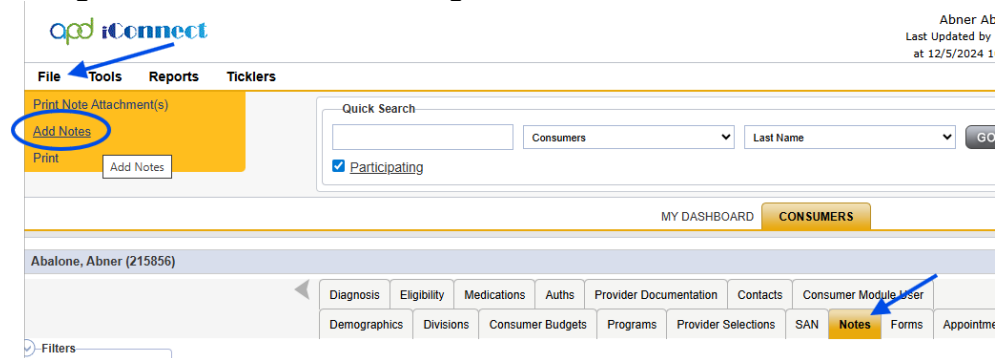
7. Fill out the Contact Details screen.
 - a. Primary Relationship = Legal Representative
 - b. Relationship(s) = the type of legal representative
 - i. Guardian
 - ii. Guardian Advocate
 - iii. Power of Attorney (POA)
 - iv. Durable Power of Attorney (DPOA)
 - v. Parent
 - vi. Medical Proxy
 - c. Active Military Status = as applicable
 - d. Comments = as needed
 - e. Complete the Demographic Information as applicable.

Contact Detail	
Instructions	For ALL types of legal representative, the primary relationship must ALWAYS be Legal Representative (in a minor) so they can receive all legal notices.
Primary Relationship *	Legal Representative
Relationship(s)	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <ul style="list-style-type: none"> Advocate Attorney Caregiver Case Manager CDC Representative Circle of Supports Client Advocate </div> <div style="width: 45%;"> <ul style="list-style-type: none"> Guardian Guardian Advocate Power of Attorney (POA) Durable Power of Attorney (DPOA) Parent Medical Proxy </div> </div>
Active Military Status	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>
Comments	<div style="border: 1px solid #ccc; height: 30px;"></div>
Demographic Information	
Last Name *	ABC
First Name *	John
Title	Mr.
Legal Rep. Organization	
Address	123 ABC Lane
Address 2	
City	ORLANDO Clear
State	FL Clear
Zip Code	32803 Clear
Main Phone	(555)555-5555
Business Phone	x(xxx)xxx-xxxx
Extension	
Cell Phone	(555)555-1234
Fax Number	x(xxx)xxx-xxxx
Email	email@3mail.com

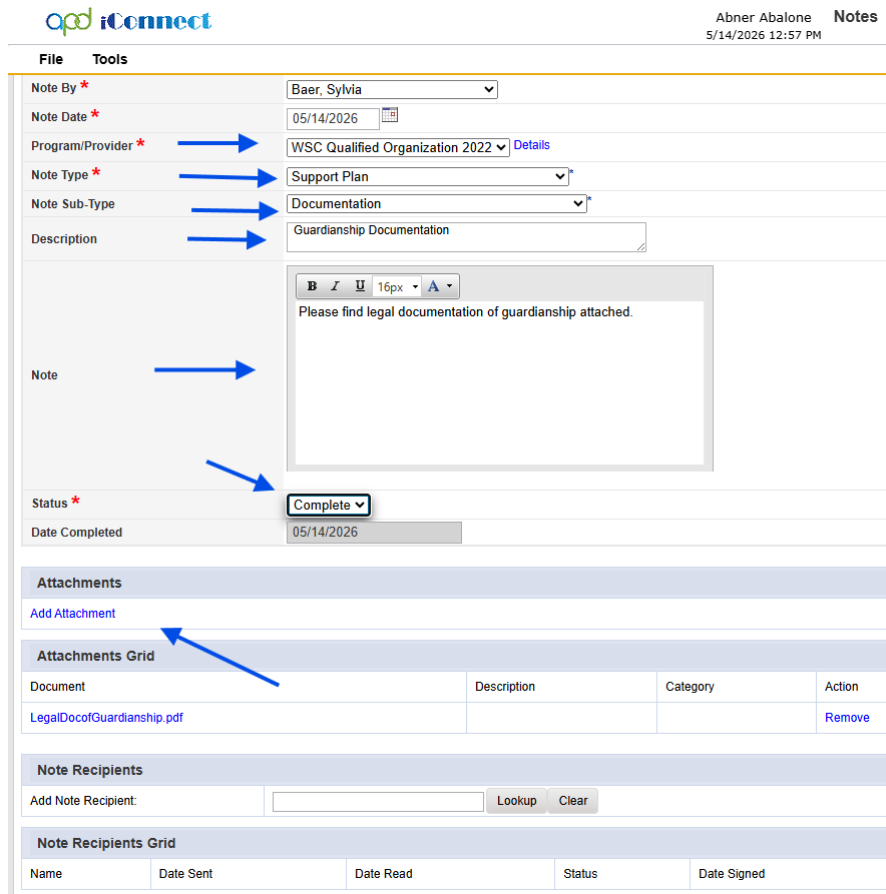
8. Once complete, navigate to **File > Save and Close Contacts**.



9. Navigate to the **Notes** tab and go to **File > Add Notes**.



10. In the Notes Details screen, fill out the Note as follows:
 - a. Program/Provider = Name of Qualified Organization (QO)
 - b. Note Type = Support Plan Note
 - c. Note Sub-Type = Documentation
 - d. Description = Guardianship Documentation
 - e. Notes = as needed
 - f. Status = Complete
 - g. Add Attachment = legal documentation of guardianship (not needed for parents of a minor)



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File Tools

Note By *

Note Date *

Program/Provider * [Details](#)

Note Type *

Note Sub-Type

Description

Note

Please find legal documentation of guardianship attached.

Status *

Date Completed

Attachments

[Add Attachment](#)

Attachments Grid

Document	Description	Category	Action
LegalDocofGuardianship.pdf			Remove

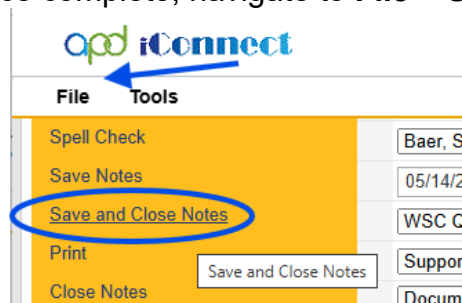
Note Recipients

Add Note Recipient:

Note Recipients Grid

Name	Date Sent	Date Read	Status	Date Signed
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11. Once complete, navigate to **File > Save and Close Notes**.



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File Tools

Spell Check

Save Notes

Save and Close Notes

Print

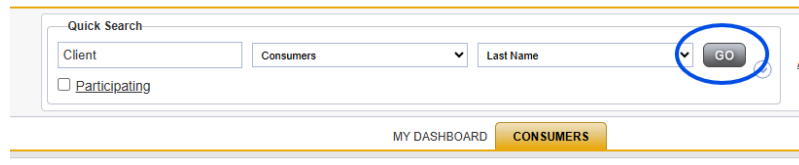
Close Notes

Adding a Client Advocate Contact and Note

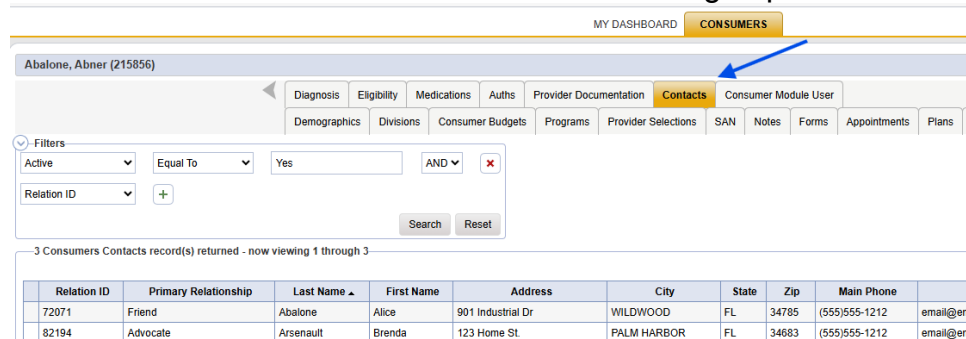
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- Navigate to the Consumer record utilizing the Quick Search.

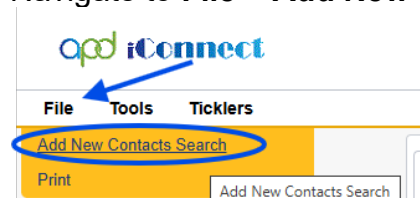


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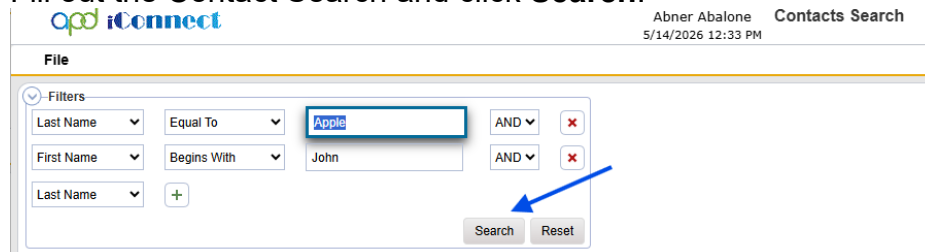


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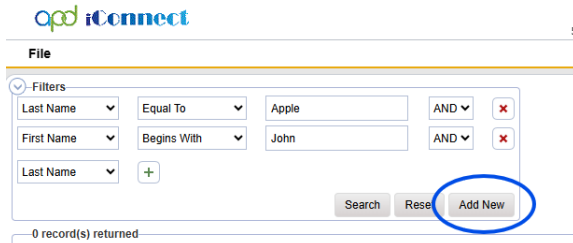
- Navigate to **File > Add New Contacts Search**.



- Fill out the Contact Search and click **Search**.



6. View any records returned.
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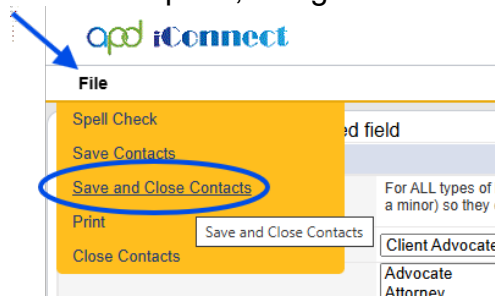


7. Fill out the Contact Details screen.
 - a. Primary Relationship = Client Advocate
 - b. Relationship(s) = any additional relationships as applicable.
 - c. Active Military Status = as applicable
 - d. Comments = as needed
 - e. Complete the Demographic Information as applicable.

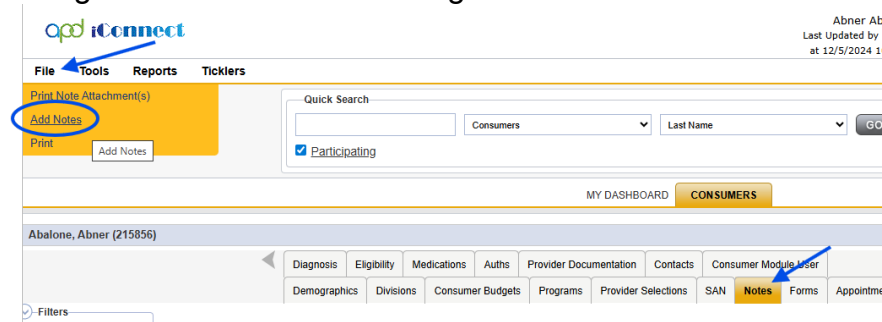
An asterisk (*) indicates a required field

Contact Detail	
Instructions	For ALL types of legal representative, the primary relationship must ALWAYS be Legal Representative a minor) so they can receive all legal notices.
Primary Relationship *	Client Advocate
Relationship(s)	<div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid gray; padding: 2px;"> Advocate Attorney Caregiver Case Manager CDC Representative Circle of Supports Client Advocate </div> <div style="border: 1px solid gray; padding: 2px;"> Employer </div> </div>
Active Military Status	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>
Comments	<div style="border: 1px solid gray; height: 30px;"></div>
Demographic Information	
Last Name *	Apple
First Name *	John
Title	Mr.
Legal Rep. Organization	
Address	100 ABC Lane
Address 2	
City	ORLANDO Clear
State	FL Clear
Zip Code	32801 Clear
Main Phone	(555)555-5555
Business Phone	x(xxx)xxx-xxxx
Extension	
Cell Phone	x(xxx)xxx-xxxx
Fax Number	x(xxx)xxx-xxxx
Email	email@email.com

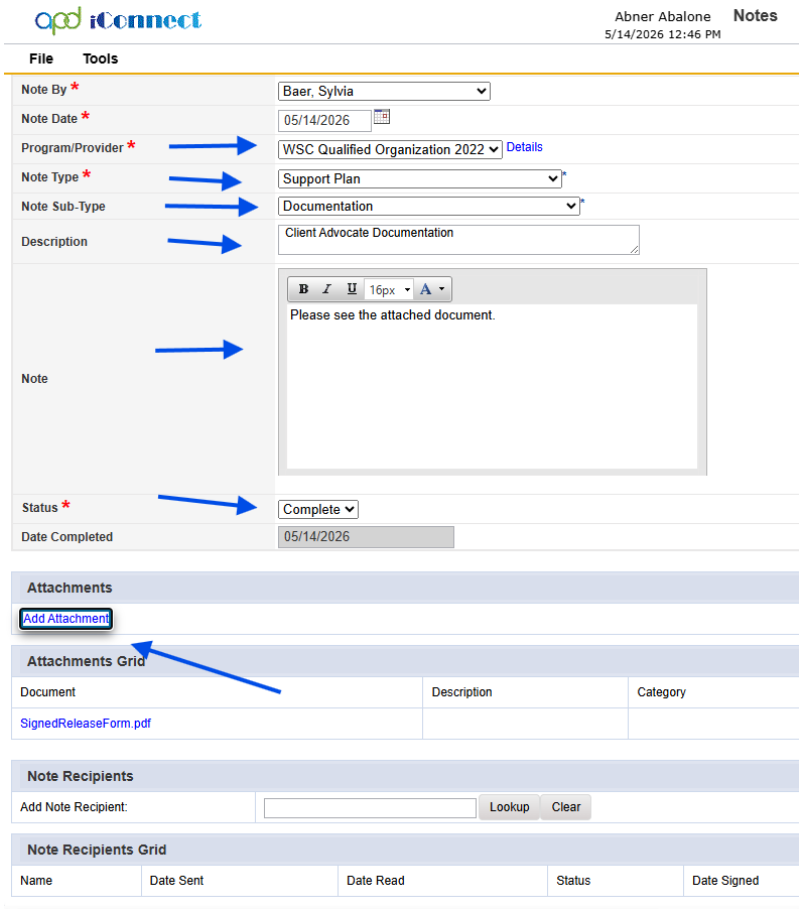
8. Once complete, navigate to **File > Save and Close Contacts**.



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10. In the Notes Details screen, fill out the Note as follows:
 - a. Program/Provider = Name of Qualified Organization (QO)
 - b. Note Type = Support Plan Note
 - c. Note Sub-Type = Documentation
 - d. Description = Client Advocate Documentation
 - e. Notes = as needed
 - f. Status = Complete
 - g. Add Attachment = signed release form "Consent to Obtain or Release PHI"



apod iConnect Abner Abalone **Notes**
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File Tools

Note By *

Note Date *

Program/Provider * [Details](#)

Note Type *

Note Sub-Type

Description

Note

Please see the attached document.

Status *

Date Completed

Attachments

Attachments Grid

Document	Description	Category
SignedReleaseForm.pdf		

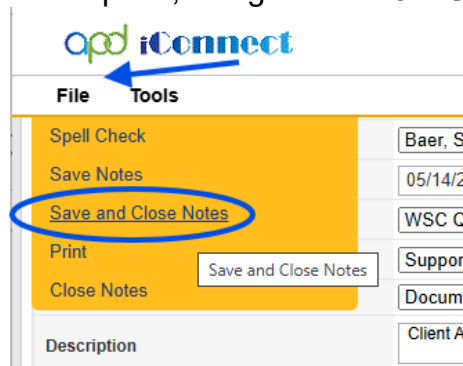
Note Recipients

Add Note Recipient:

Note Recipients Grid

Name	Date Sent	Date Read	Status	Date Signed
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11. Once complete, navigate to **File > Save and Close Notes**.



apod iConnect

File Tools

- Spell Check
- Save Notes
- Save and Close Notes**
- Print
- Close Notes

Description