

Update Updating Worker's Information in the Provider Record (Updating Caseload Limits – QO Only)

Introduction

Agency and Qualified Organization (QO) Owners are assigned the Service Provider role in iConnect. Service Providers are responsible for updating worker information in the provider record. The Service Provider role can also be assigned to other qualified employees through ID PASS. For more information on how to set up or revise an ID PASS account, review the [Step-by-Step – ID PASS Job Aid](#).

The Workers tab in the Provider's record will contain the names of the workers who have successfully completed the ID PASS process for the Agency or QO that they are employed by and have successfully logged into iConnect. Information that the Service Provider puts into their employee's record in the Workers tab will be imported into other forms and reports. For example, the phone number and email of the Waiver Support Coordinator (WSC) can be imported into the Person-Centered Support Plan (PCSP). Importing information can only happen if the WSC's information was placed accurately into the Workers tab by the Service Provider.

In this document you will learn:

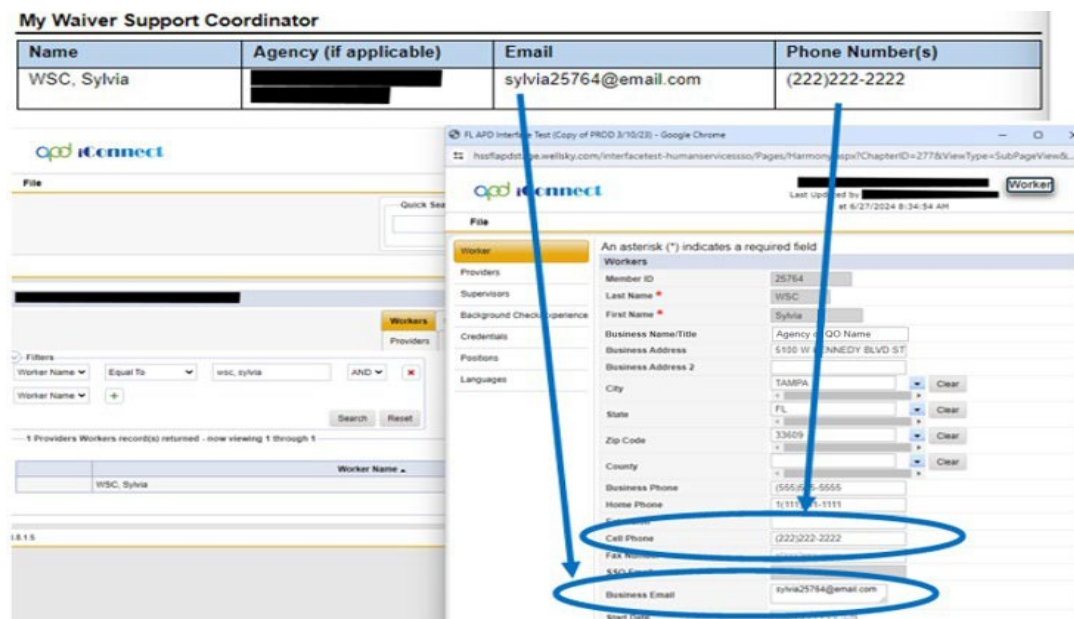
[Steps on Updating the Worker's Record in iConnect \(QO's and Service Providers\)](#)

- Business Name/Title
- Contact Information

[Steps on Updating the Worker's Record in iConnect \(QO's Only\)](#)

- Languages
- Self-Imposed Caseload Limit

Below is a screenshot of the PCSP and the employee's worker record.



My Waiver Support Coordinator

Name	Agency (if applicable)	Email	Phone Number(s)
WSC, Sylvia	[REDACTED]	sylvia25764@email.com	(222)222-2222

Worker Record Form

An asterisk (*) indicates a required field

Member ID: 25764

Last Name: WSC

First Name: Sylvia

Business Name/Title: [REDACTED]

Agency or QO Name: [REDACTED]

Business Address: 5130 W KENNEDY BLVD ST

Business Address 2: [REDACTED]

City: TAMPA

State: FL

Zip Code: 33609

Country: [REDACTED]

Business Phone: (561) 555-5555

Home Phone: 1-111-1-1111

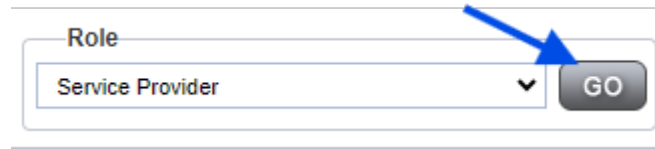
Cell Phone: (222)222-2222

Fax Number: [REDACTED]

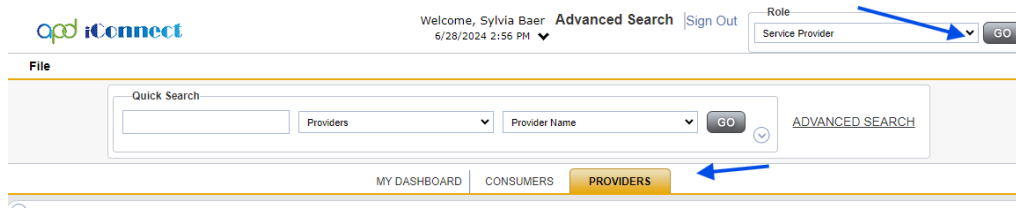
Business Email: sylvia25764@email.com

Steps on Updating the Worker's Record in iConnect

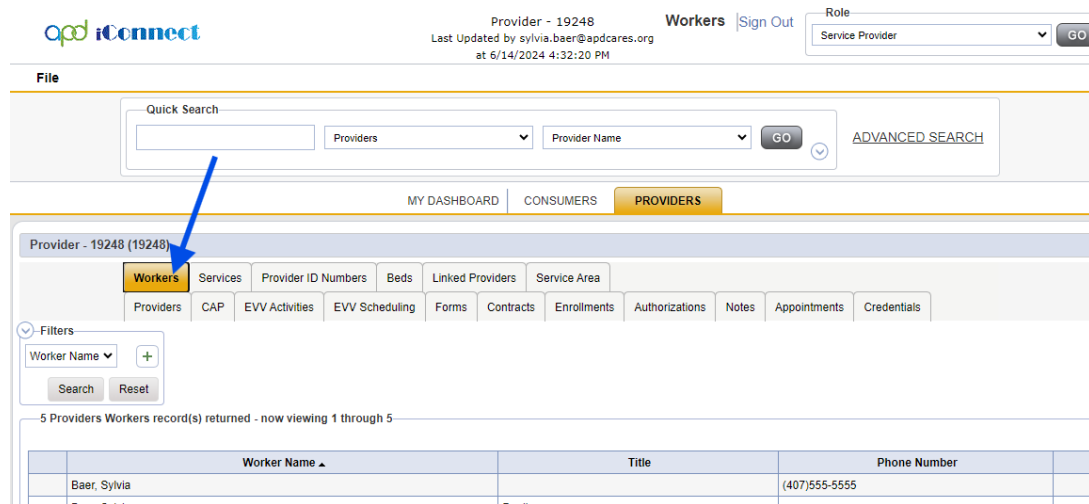
1. To begin, log into iConnect and set Role = Service Provider. Click **Go**.



2. Navigate to the Provider's Record in the Quick Search filter and click **GO**.



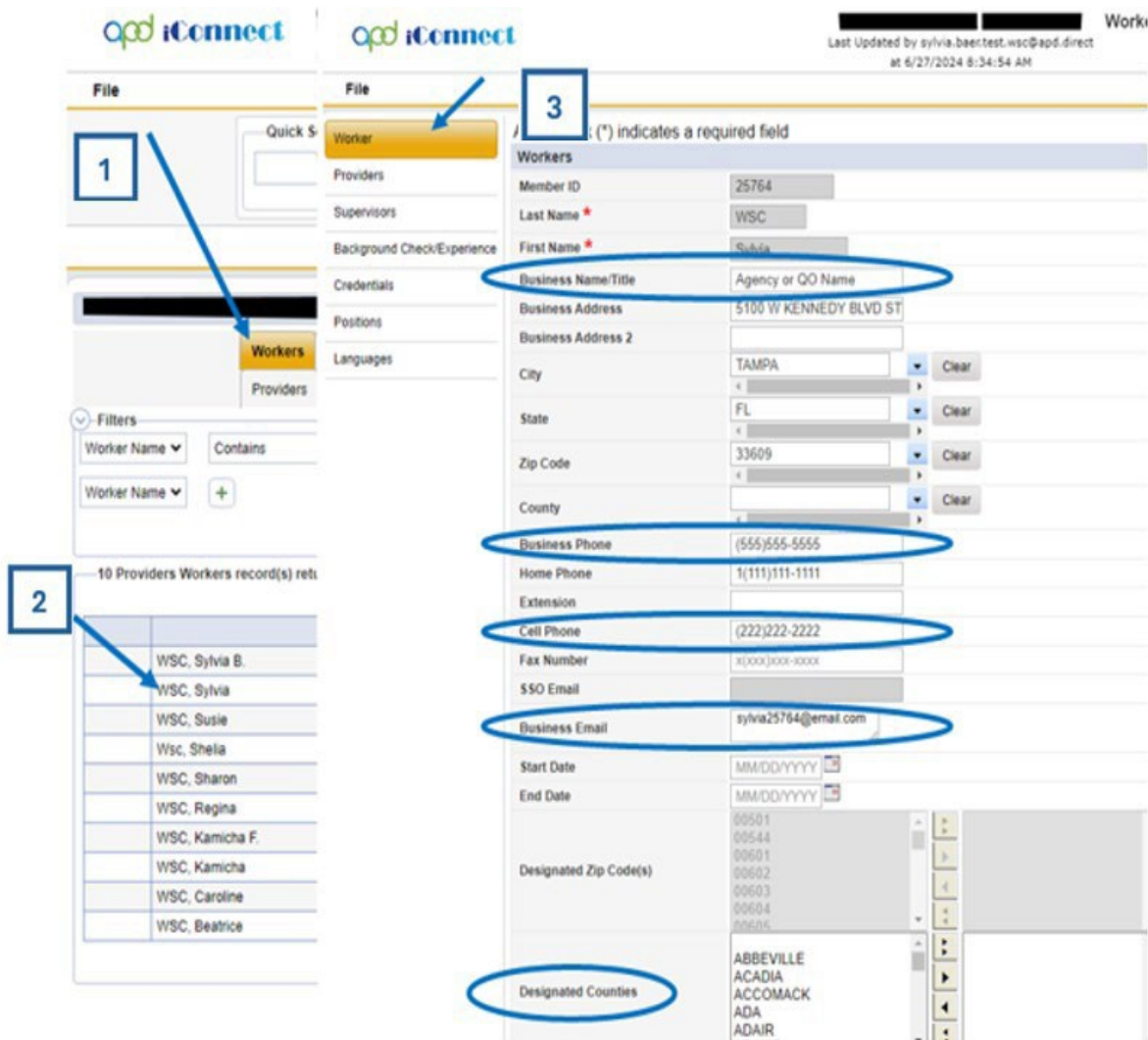
3. Navigate to the Workers tab.



Worker Name	Title	Phone Number
Baer, Sylvia		(407)555-5555

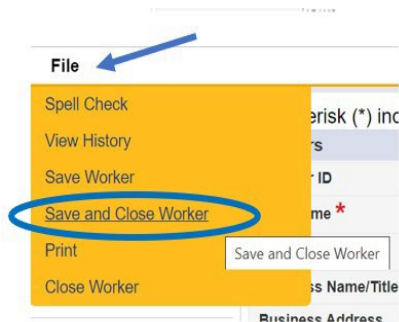
4. Click the worker's name from the list view grid. The Workers Detail screen will display. Fill out the information as needed.
 - a. Business Name/Title: the name of the agency or QO
 - b. Business Phone: this information will be visible in the Details of the Division tab in the client's record
 - c. Cell Phone: this information will be pulled into the appropriate forms
 - d. Business Email: this information will be visible in the Details of the Division tab in the client's record and pulled into the appropriate forms
 - e. Start Date: as applicable
 - f. End Date: as needed
 - g. Designated Counties: as applicable for WSCs
 - h. Exclude: only check if the worker needs to be removed from the Worker's tab. This could be utilized if there are multiple entries or if the worker no longer works for the agency/QO. If the worker no longer works for the agency/QO, be sure to deactivate the worker from the ID PASS,

Clearinghouse, and iConnect. [Utilize the Deactivating a Worker Record Job Aid for further guidance.](#)



The screenshot shows the iConnect interface. On the left, a 'File' menu is open, and the 'Workers' option is highlighted. Below it, a list of workers is displayed, with 'WSC, Sylvia B.' selected. On the right, the 'Worker' form is visible, with several fields circled in blue: Business Name/Title, Business Address, Business Phone, Cell Phone, Business Email, and Designated Counties. A 'File' menu is also open at the top right, with 'Save and Close Worker' circled in blue.

5. Once completed, navigate to **File** and select **Save and Close Worker**.



A close-up of the 'File' menu. The 'Save and Close Worker' option is circled in blue. Other options visible include Spell Check, View History, Print, and Close Worker.

An example of the information from the Details of the Division tab in the client's record.

Harmony Entity Viewer	
Workers	
Member ID	25764
Last Name	WSC
First Name	Sylvia
Title	
Business Address	5100 W KENNEDY BLVD STE 152
City	TAMPA
State	FL
Zip Code	33609
Business Phone	(555)555-5555
Extension	
Fax Number	
Business Email	sylvia25764@email.com
Start Date	

Steps on Updating the Worker's Record in iConnect (QO's Only)

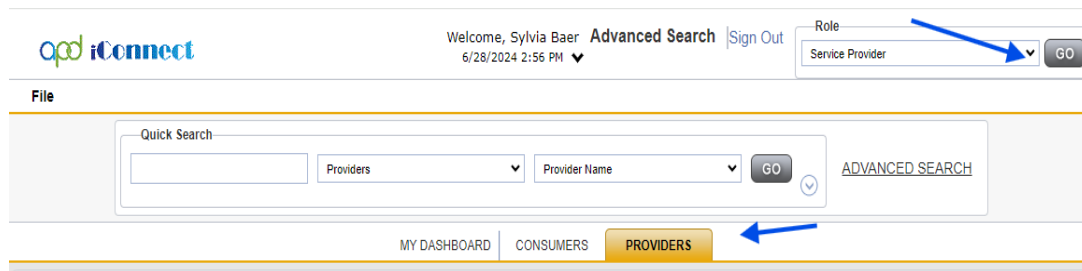
This information is from the November 3, 2021 [WSC Advisory #2020-035 Amended Worker Record Updates.](#)

The QO owner will update the Worker records for the WSCs and CDC+ Consultants that are employed with the QO to include the Designated Zip Codes and designated Counties that the WSC and the CDC+ Consultants services clients in.

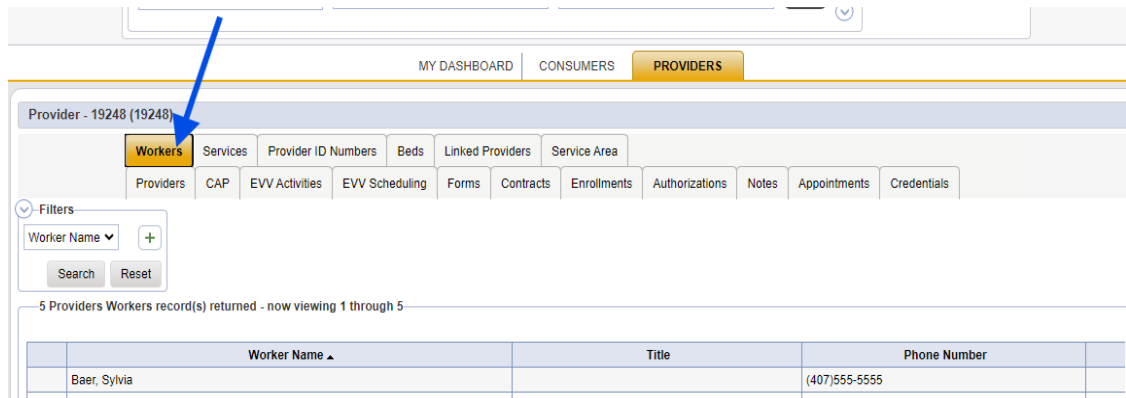
1. To begin, log into iConnect and set Role = **Service Provider**. Click **Go**.



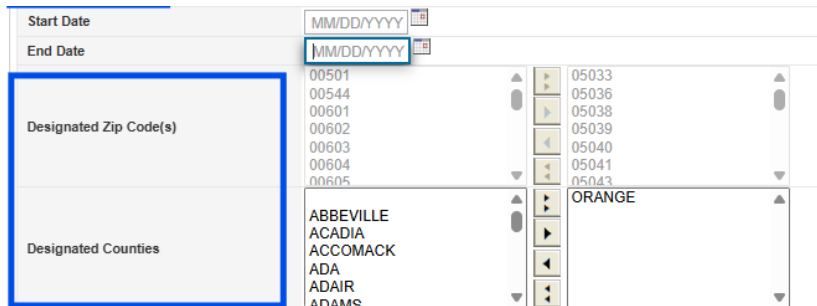
2. Navigate to the Provider's Record in the Quick Search filter and click **GO**.



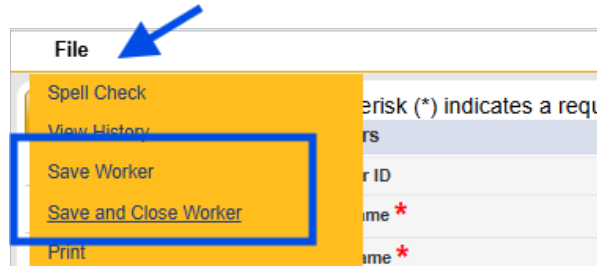
3. Navigate to the Workers tab.



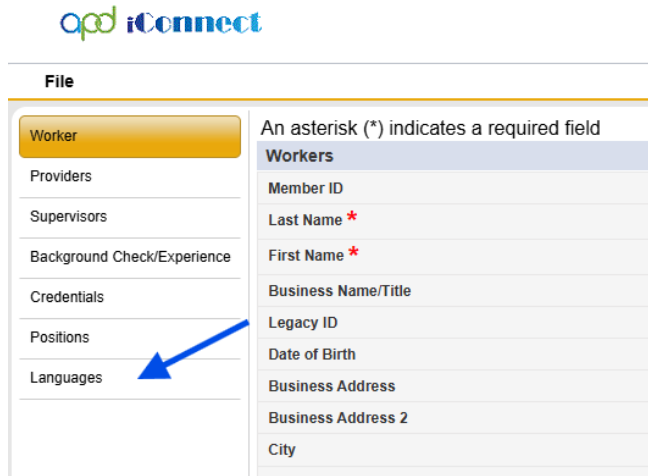
4. Click the worker's name from the list view grid. The Workers Detail screen will display. Fill out the information as needed.
 - a. Designated Zip: this field will auto fill once you select Designated Counties
 - b. Designated Counties: select all the counties in which the WSC or CDC+ Consultant serves clients



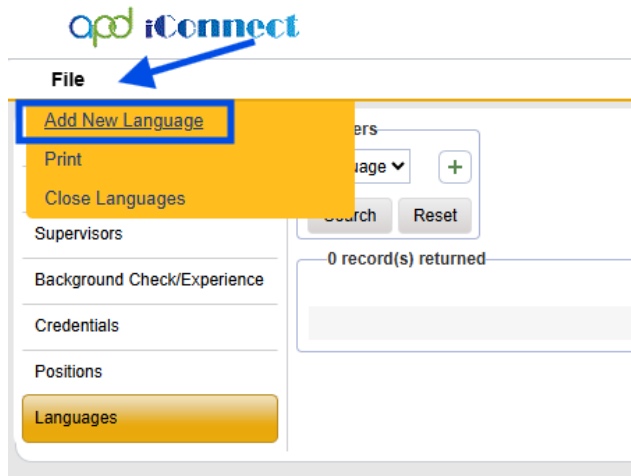
5. **File > Save Worker** or **Save and Close Worker**



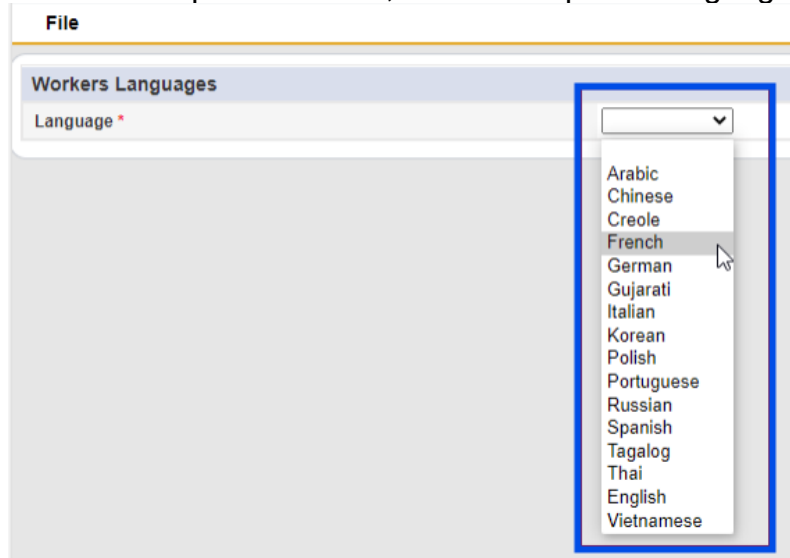
6. To update the Languages: Navigate to the Languages bookmark.



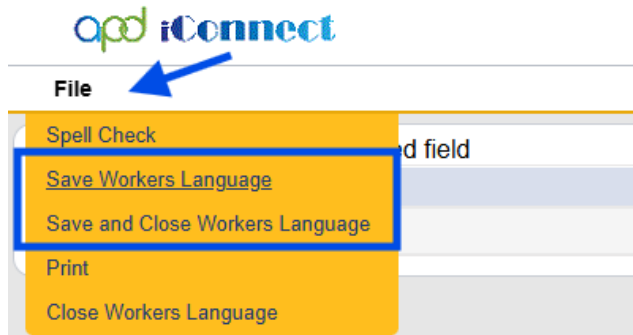
7. Go to File > Add New Language



8. From the drop-down menu, select the spoken language.

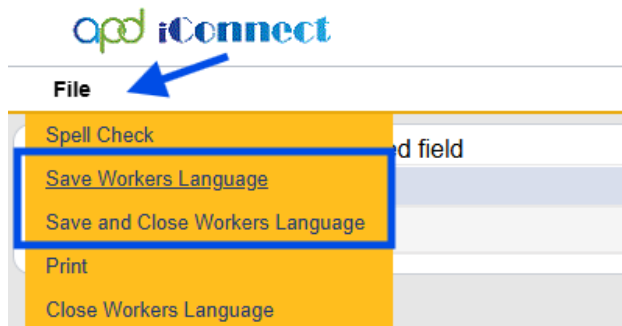


- Click **File > Save Workers Language** or **Save and Close Workers Language** if completed.



- If multiple languages are spoken, complete these steps until all languages are listed on the Languages tab.

- Once completed with all of the languages spoken by the WSC/CDC+ Consultant, select **File > Save and Close Workers Language**.



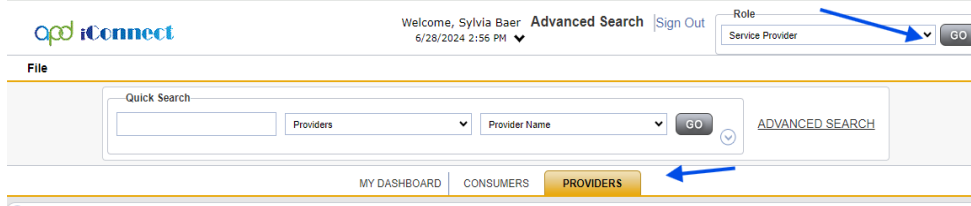
Steps on Updating the WSCs and CDC+ Consultants Caseload Limits in iConnect (QO's Only)

The QO owner will update the Worker records for the WSCs and CDC+ Consultants that are employed with the QO to identify the caseload limits of their employees. The caseload limits are not to be set higher than the Agency Imposed Caseload Limits.

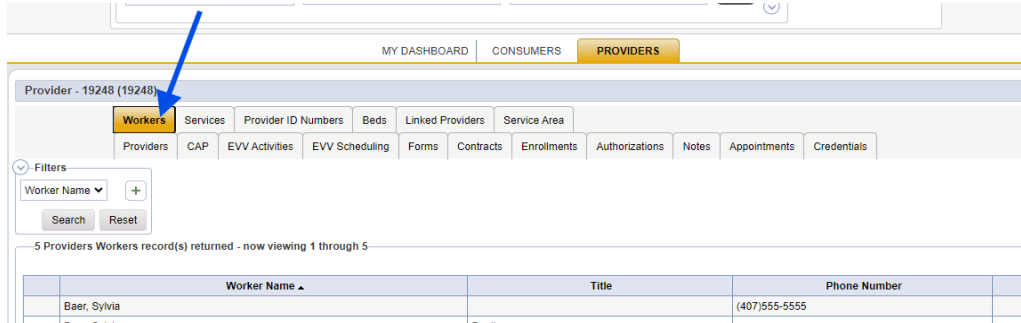
- To begin, log into iConnect and set Role = **Service Provider**. Click **Go**.

A screenshot of a form field labeled 'Role'. The dropdown menu is open, showing 'Service Provider' as the selected option. A blue arrow points to the 'GO' button next to the dropdown.

2. Navigate to the Provider's Record in the Quick Search filter and click **GO**.

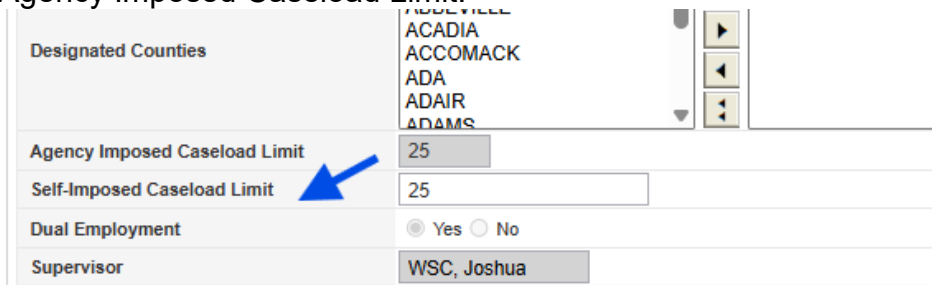


3. Navigate to the Workers tab.



4. Click the worker's name from the list view grid. The Workers Detail screen will display. Update the following field.

- Self-Imposed Caseload Limit = enter caseload limit equal to or less than the Agency Imposed Caseload Limit.



5. **File > Save Worker and Close Workers**

