# WSC Mentee Role and Tasks for QOs and Mentors in iConnect

## Introduction

Waiver Support Coordinators (WSCs) in the mentorship program will gain access to iConnect under the WSC Mentee role. This will allow the Mentee to be assigned a caseload and complete tasks as it relates to the mentorship program. The WSC Mentee role has limited access and will require the Mentor to approve some tasks such as progress notes and cost plans.

The Qualified Organization (QO) owner or designee in the Service Provider role must complete prework to allow the WSC Mentee and the Mentor to complete their tasks.

This job aid will break down the tasks that need to be taken by the QO owner/designee, the Mentor and the Mentee.

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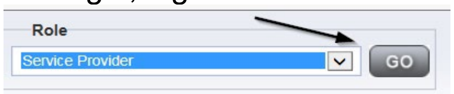
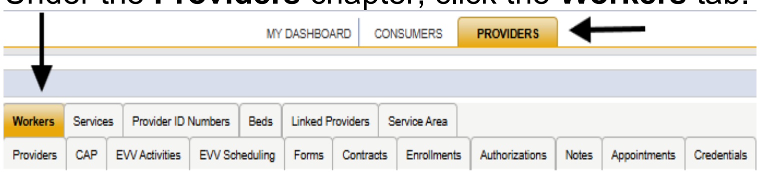
## Service Provider Role – Add the WSC Mentee Position to the Mentee's Worker Record and Assign Supervisor

After the WSC Mentee has gained access to iConnect and has been selected by a client to be their WSC, the QO owner/designee will assign the WSC Mentee as a WSC Mentee in the Positions bookmark of the Worker record. The QO owner/designee will also assign the Mentor as a Supervisor in the Worker record.

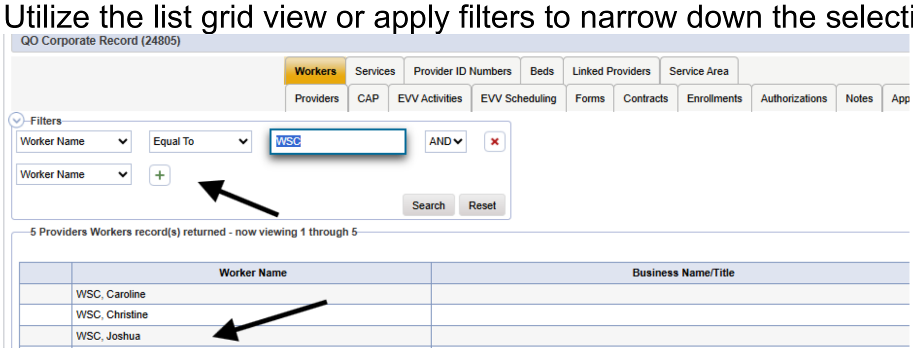
1. To begin, login to iConnect and set Role to **Service Provider**. Click **Go**.



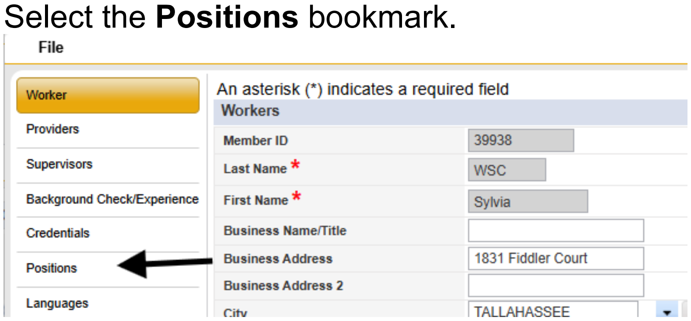

2. Under the **Providers** chapter, click the **Workers** tab.



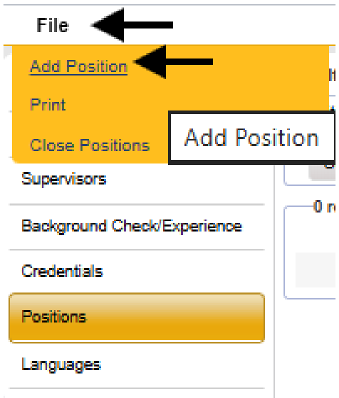

3. Locate the Worker that is being assigned as the WSC Mentee position. Utilize the list grid view or apply filters to narrow down the selection.



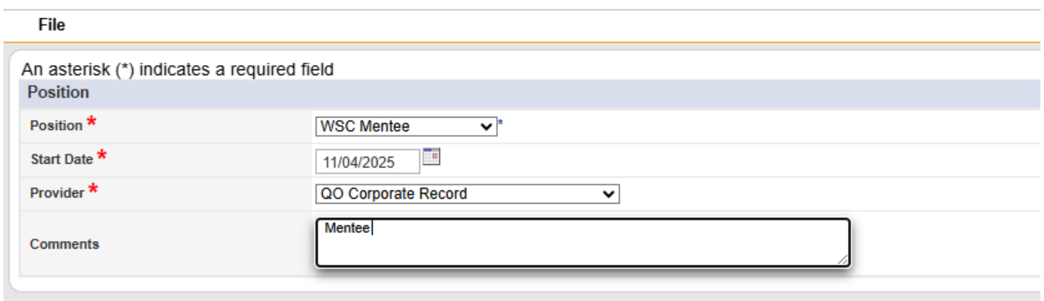

4. Select the **Positions** bookmark.




5. **File > Add Position**

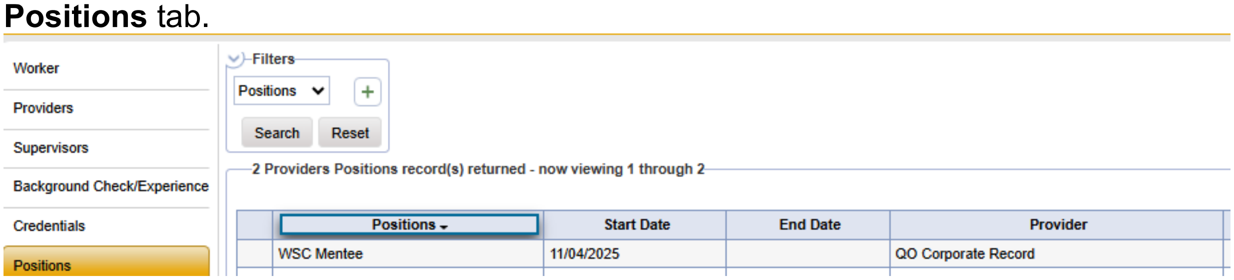



6. Fill out the following:
    a. Position = WSC Mentee
    b. Start Date = enter date
    c. Provider = QO name
    d. Comments = as needed



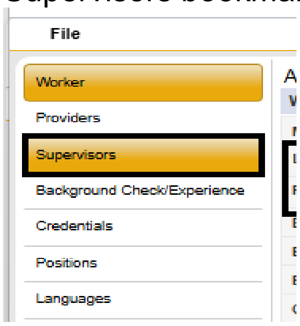

7. **File > Save and Close Position**


8. *Save was Successful*, will pop-up, and the Mentee will appear in the **Positions** tab.

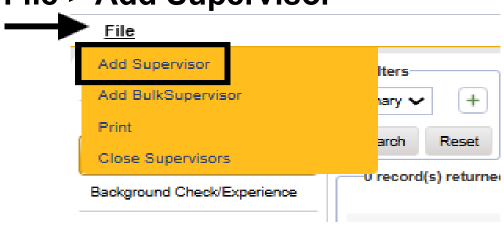



9. **File > Close Positions**.

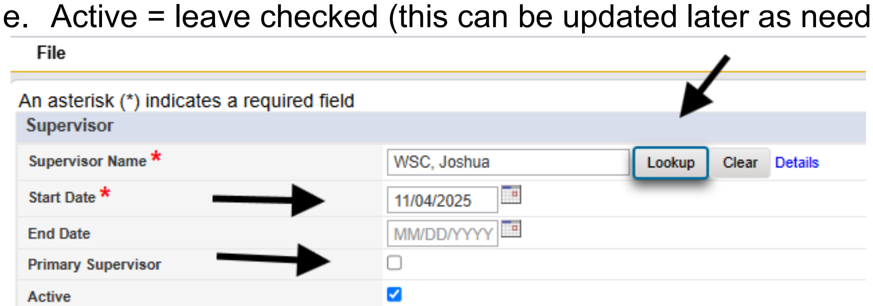

10. To assign the WSC Mentee's Mentor as a Supervisor, navigate to the Supervisors bookmark from the WSC Mentee's Worker record.




11. **File > Add Supervisor**

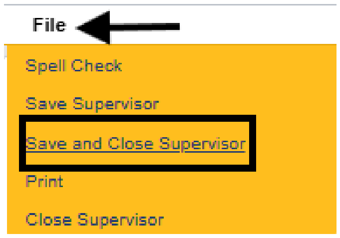



12. The Supervisor details page displays. Update the following fields:
    a. Supervisor Name = search for and select the Mentor's name utilizing the **Lookup** button.
    b. Start Date = enter date
    c. End Date = enter date if applicable
    d. Primary Supervisor = check if applicable
    e. Active = leave checked (this can be updated later as needed)




***PRO TIP: Make sure to utilize the <u>Clear</u> button if there is already a supervisor's name in the field.***

13. When finished, navigate to **File > Select Save and Close Supervisor.**



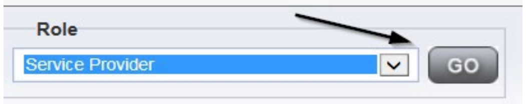

14. The page refreshes, and a summary of the Supervisor's details is displayed in the Supervisor List view.


15. This process can be completed multiple times if there are backup supervisors. Only one supervisor can be marked as the primary supervisor.

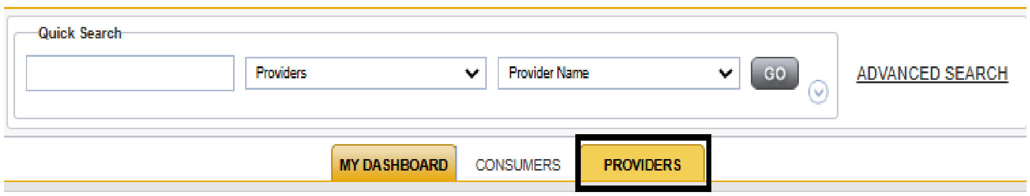
## Service Provider Role – QO Notifies Mentor of Mentee Assignment

Once the WSC Mentee gains access to iConnect and the WSC mentee’s worker record has been updated, the QO Owner or Designee will notify the Mentor of an assigned WSC Mentee via a Note in iConnect.

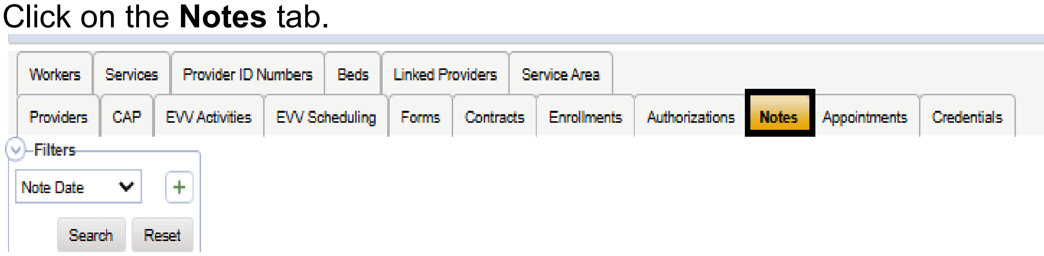
1. To begin, log into iConnect and set Role to **Service Provider**. Click **Go.**



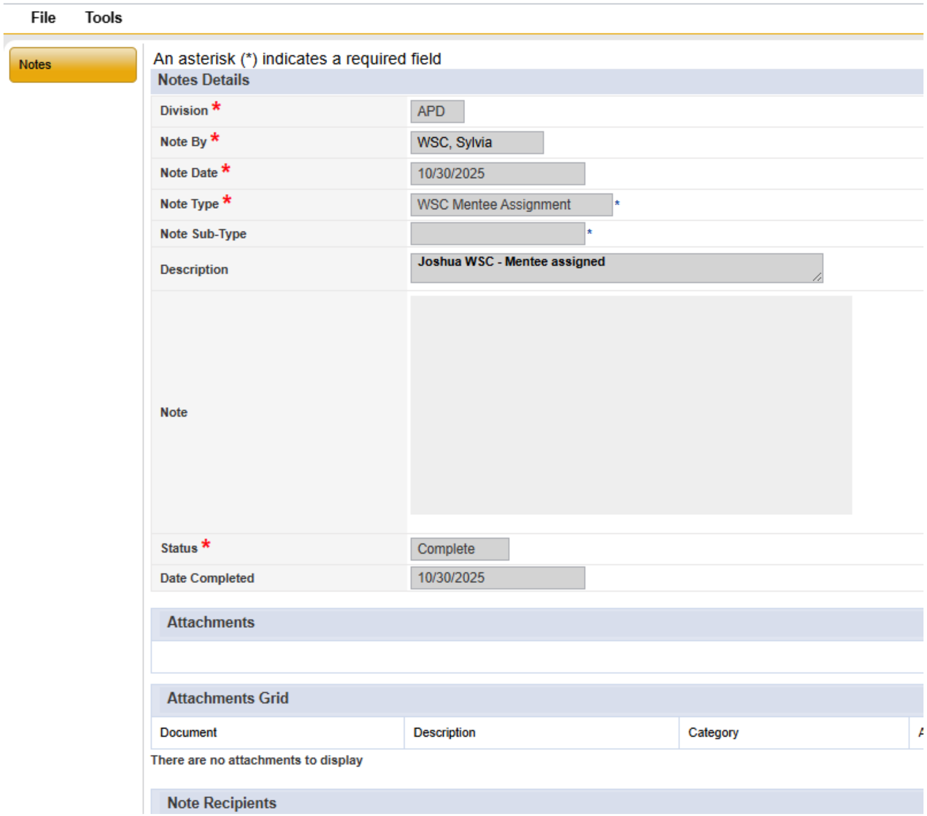

2. Navigate to the Provider record. Click on the **Providers** chapter and click **Go** at the Quick Search.



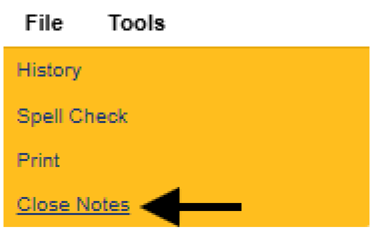

3. Click on the **Notes** tab.




4. Navigate to **File > Add Notes**.
   a. Update the following fields.
      i. Note Type = WSC Mentee Assignment
      ii. Note Sub-Type = leave blank
      iii. Description = Name of WSC Mentee – Mentee Assigned
      iv. Notes = leave blank (if the mentor does not have the Service Provider role, the mentor will not have access to read the notes section)
      v. Status = Complete
      vi. Note Recipient = add the Mentor
      vii. **File > Save and Close Notes**



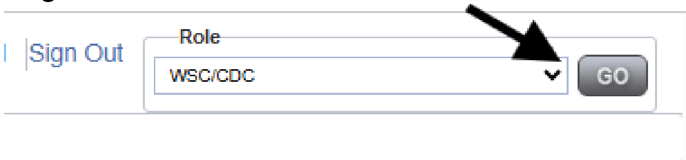

5. **File > Save and Close Note.**



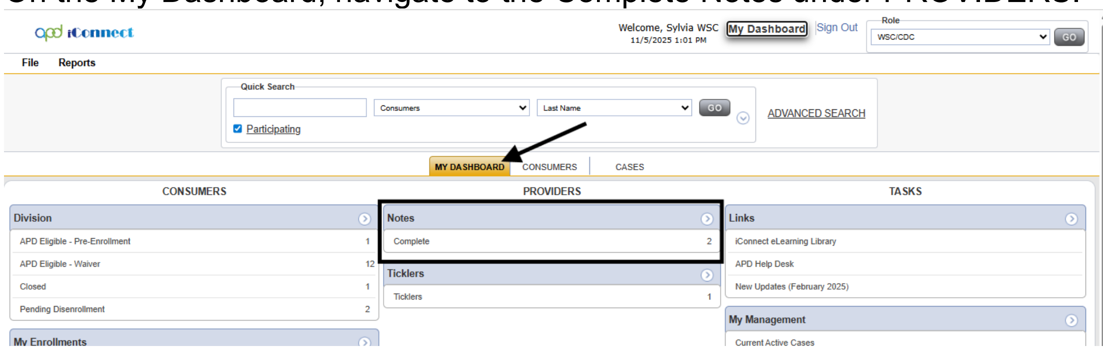
## WSC/CDC Role (Mentor) – Notified of WSC Mentee Assignment

The WSC Mentor will view the Complete Note on their My Dashboard informing the Mentor of a WSC Mentee assignment.

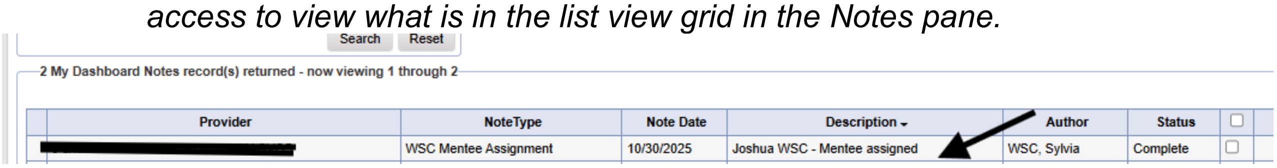
1. Log into iConnect and set Role to **WSC/CDC**. Click **Go**.



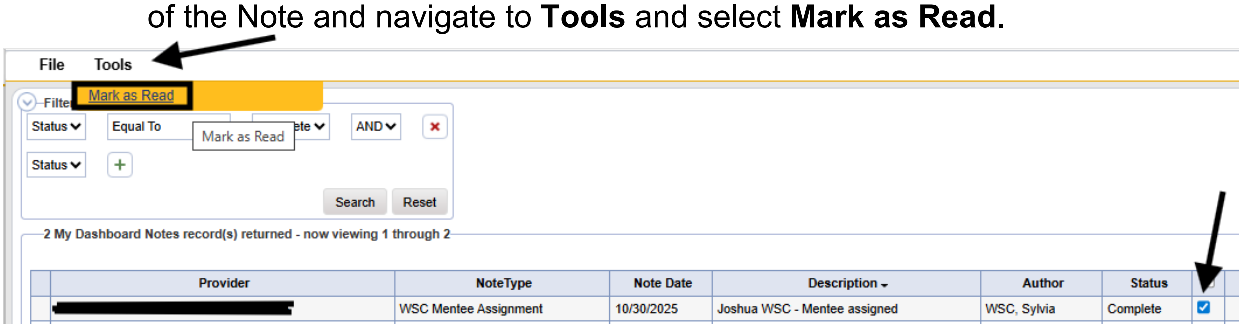

2. On the My Dashboard, navigate to the Complete Notes under PROVIDERS.




3. Note the WSC Mentee's name in the Description.
   **Note:** *If the Mentor does not have the Service Provider Role, they will not be able to read any messages within the Note. The Mentor will only have access to view what is in the list view grid in the Notes pane.*




4. To remove the Note from the My Dashboard, click the checkbox on the right of the Note and navigate to **Tools** and select **Mark as Read**.

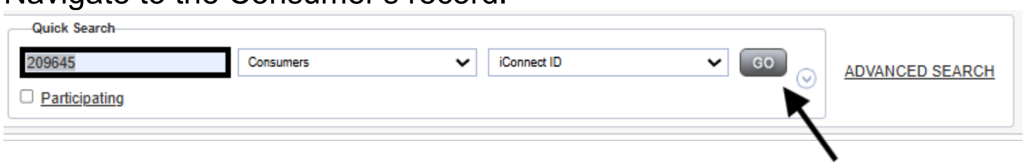


## WSC/CDC Role (Mentor) – Adding WSC Mentee Provider Selection

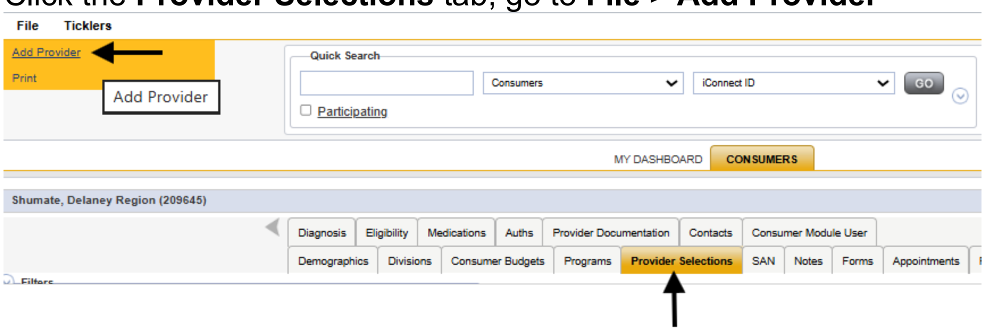
When the WSC Mentee is selected by a client to be the client's Support Coordinator, the Mentor will add a Provider Selection record for WSC Mentee and will add Provider Selection for Support Coordination. This is required to allow the WSC Mentee to view their caseload on their My Dashboard.

1. Log into iConnect and set Role to **WSC/CDC**. Click **Go**.

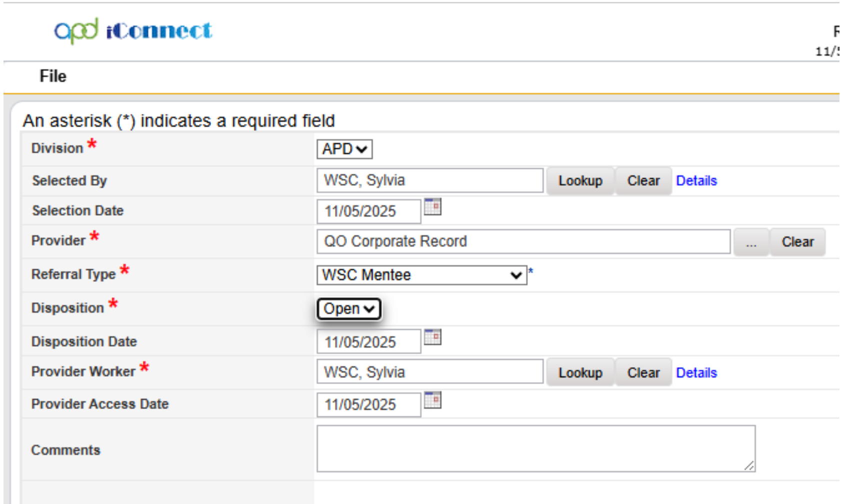

2. Navigate to the Consumer's record.



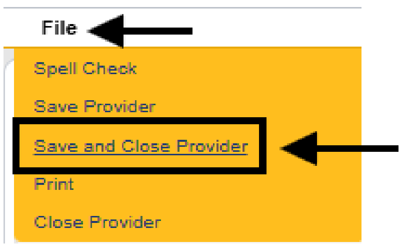

3. Click the **Provider Selections** tab, go to **File > Add Provider**




4. Update the following areas:
   a. Division = APD
   b. Selected By= Mentor (Defaults to self)
   c. Selection Date = Defaults to today
   d. Provider = QO's Name
   e. Referral Type = WSC Mentee
   f. Disposition = Open
   g. Disposition date = date assigned to Mentee's caseload
   h. Provider Worker = WSC Mentee
   i. Provider Access Date = enter date
   j. Comments = Add a comment that the selection record is being created to provide Provider Agency-level access to the consumer's record.




5. Click **File** > **Save and Close Provider**

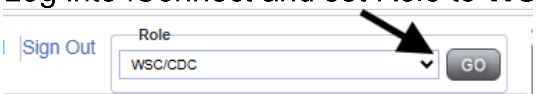



6. Verify or add the Provider Selection record for Waiver Support Coordinator with the Mentor as the Provider Worker. For more information on adding a Provider Selection, visit the [Provider Selection Catalog] located in the WSC Library.

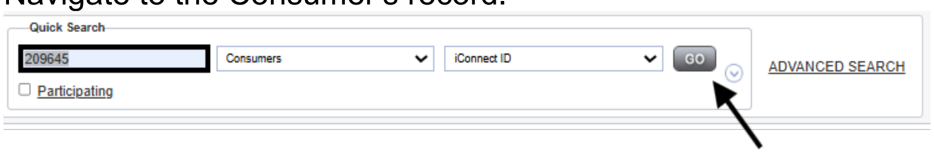
## WSC/CDC Role (Mentor) – Adding WSC Mentee in the Divisions tab

The Mentor will also add the WSC Mentee to the Division tab of each of the clients on the WSC Mentee's caseload. The Mentor will be set as the Primary Worker for the client by APD and the Mentor will add the WSC Mentee as a worker on the Divisions tab. This will indicate that this client would not count against the Mentor for caseload amounts, since the client's Support Coordinator is the WSC Mentee. To update the Division tab of the impacted clients, follow the steps below.

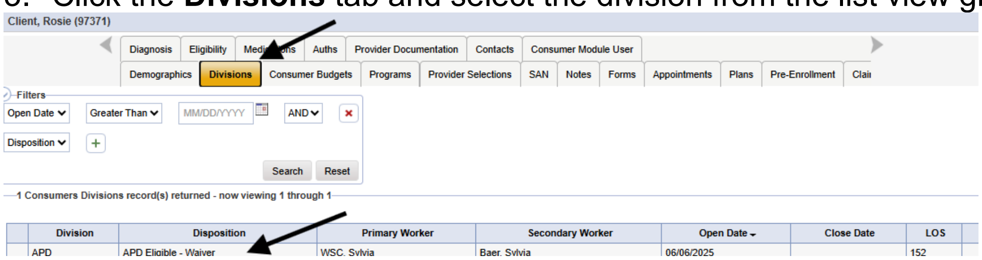
1. Log into iConnect and set Role to **WSC/CDC**. Click **Go**.



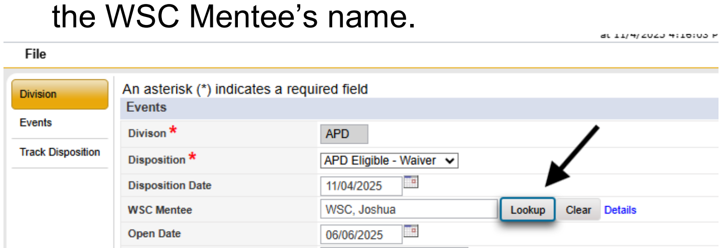

2. Navigate to the Consumer's record.




3. Click the **Divisions** tab and select the division from the list view grid.




4. Update the WSC Mentee by clicking the Lookup button and searching for the WSC Mentee's name.



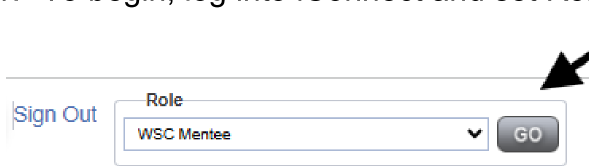

5. Click **File** > **Save and Close Divisions**

6. This WSC Mentee's name and contact information updated by the QO owner/designee will be viewable by APD staff and Service Providers. For more information on updating worker records, please visit Updating Worker's Information in the Provider Record job aid located in the WSC Library.

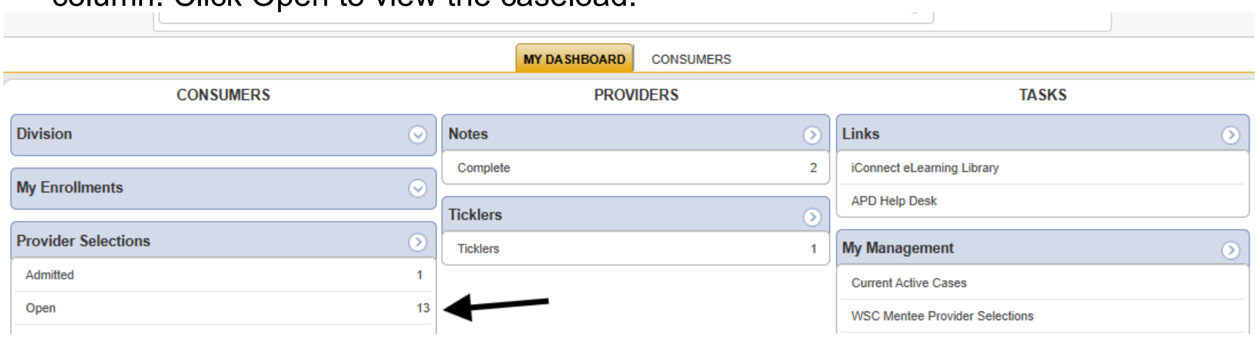
## WSC Mentee Role – Current Active Cases

The WSC Mentee will be able to view the clients on their caseload from their My Dashboard if the Mentor has added the WSC Mentee Provider Selection to the Consumer’s record.

1. To begin, log into iConnect and set Role to **WSC Mentee**. Click **Go**.




2. On My Dashboard, locate the Provider Selections under the CONSUMERS column. Click Open to view the caseload.



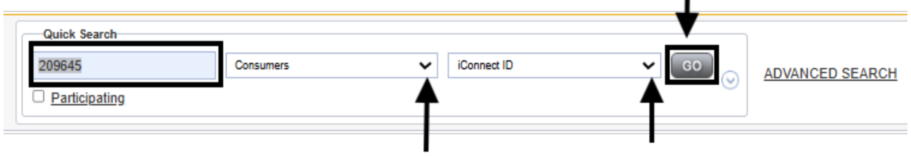

3. The list view grid will display the list of clients that the WSC Mentee is assigned to from the Provider Selection done in the [WSC/CDC Role (Mentor) - Adding WSC Mentee Provider Selection.]

## WSC Mentee Role – Searching for Clients

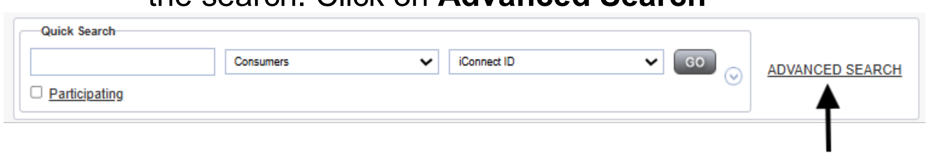
The WSC Mentee will be able to search for clients in which their QO has an active authorization for.

1. To begin, log into iConnect and set Role to **WSC Mentee**. Click **Go**.

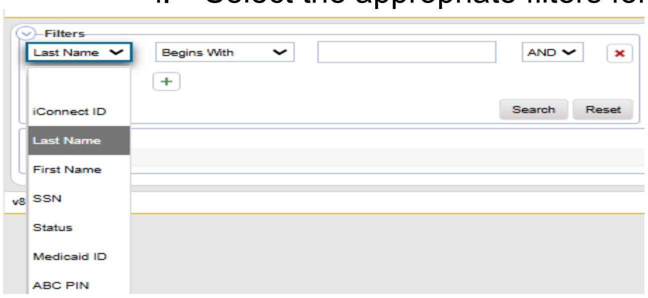

2. The WSC Mentee will be able to utilize the Quick Search.




   a. The Advanced Search is available and can assist in narrowing down the search. Click on **Advanced Search**




      i. Select the appropriate filters for the search.




      ii. To add additional search features, click the green **+** sign. To remove a search criteria, click the red **X**. Click **Search** to execute the search.

## WSC Mentee Role – Notes

Notes in iConnect are a way for APD staff, service providers, WSC’s and Mentees to communicate through iConnect in the client’s record. For additional information on Notes in iConnect, please visit the Notes in iConnect Job Aid.

## WSC Mentee Role – Progress Notes

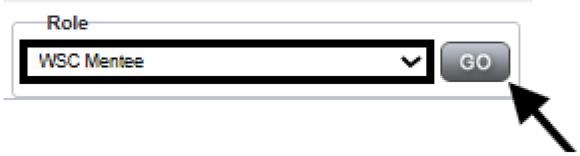
Upon a client receiving services, Providers are required to complete provider documentation based on the services provided in accordance with the Developmental Disabilities Individual Budgeting Waiver Services Coverage And Limitations (iBudget) Handbook. The WSC Mentee will document their services utilizing the Provider Documentation in the Consumer’s record within iConnect.

WSCs and the WSC Mentee are able to document services through one provider documentation entry per month, or they may use multiple entries during the month and utilize the 0000 codes. The directions below will instruct the WSC Mentee on how to do both. For additional information on how to submit documentation in iConnect, please visit Chapter 18a WSC Service Recording of the iConnect Case Management Manual.

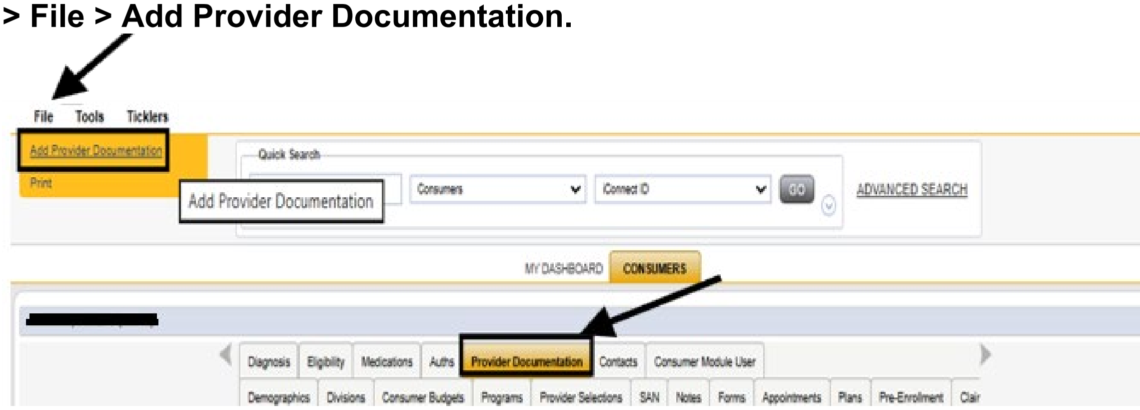
### Adding Provider Documentation Using the Authorization

The authorization is used once a month. Additional contacts may be added to the initial Provider Documentation created for the month, or another entry may be entered. If entering a separate entry please proceed to the section, Adding Provider Documentation without Using the Authorization.

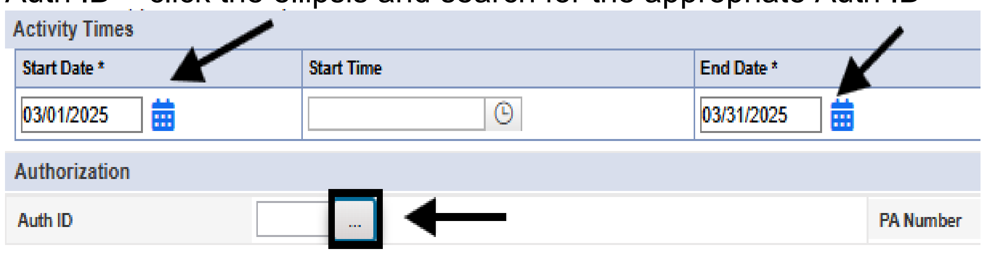
1. To begin, log into iConnect and set Role to **WSC Mentee**. Click **Go**.



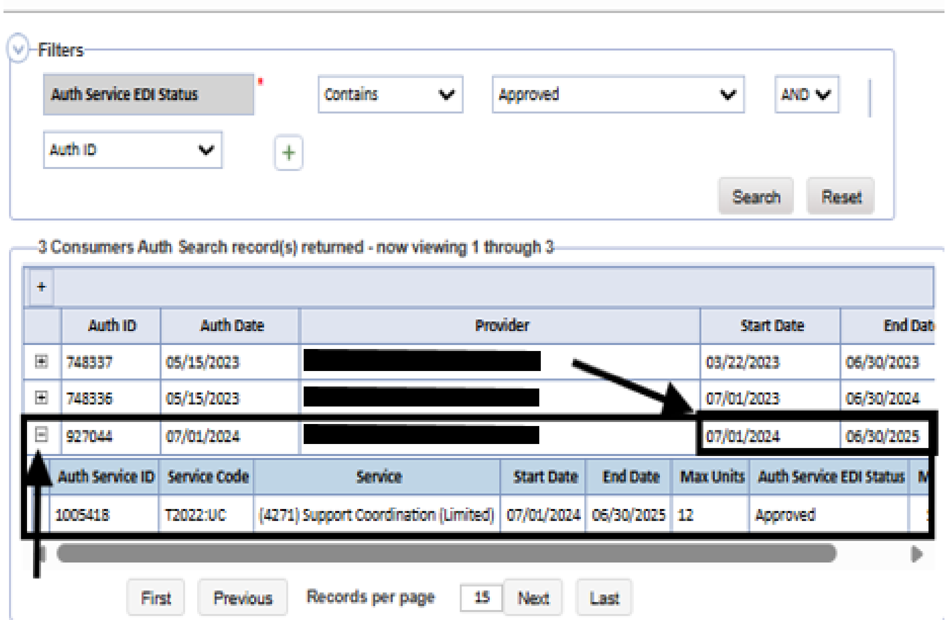

2. Navigate to the Consumer's record and click the **Provider Documentation > File > Add Provider Documentation.**



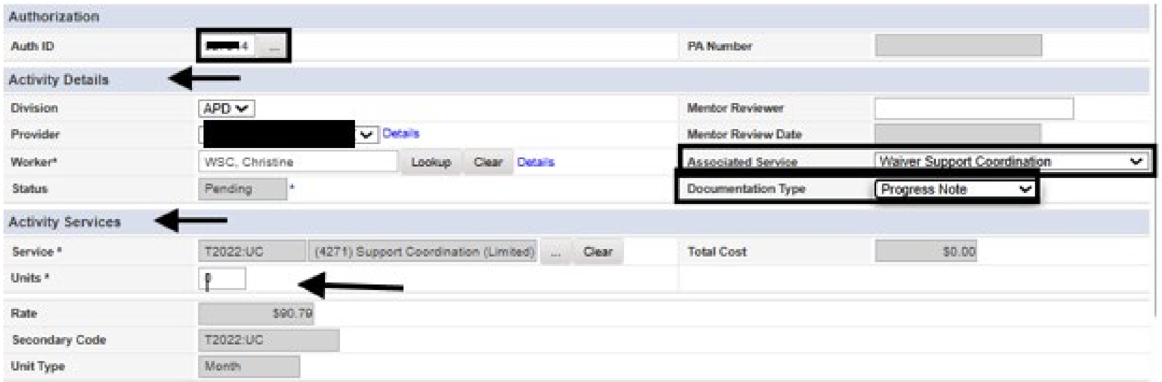
3. The Provider Documentation Details page is displayed. Update the following fields:
    a. Start Date = enter date
    b. Start Time = leave blank
    c. End Date = enter date
    d. End Time = leave blank
    e. Auth ID = click the ellipsis and search for the appropriate Auth ID



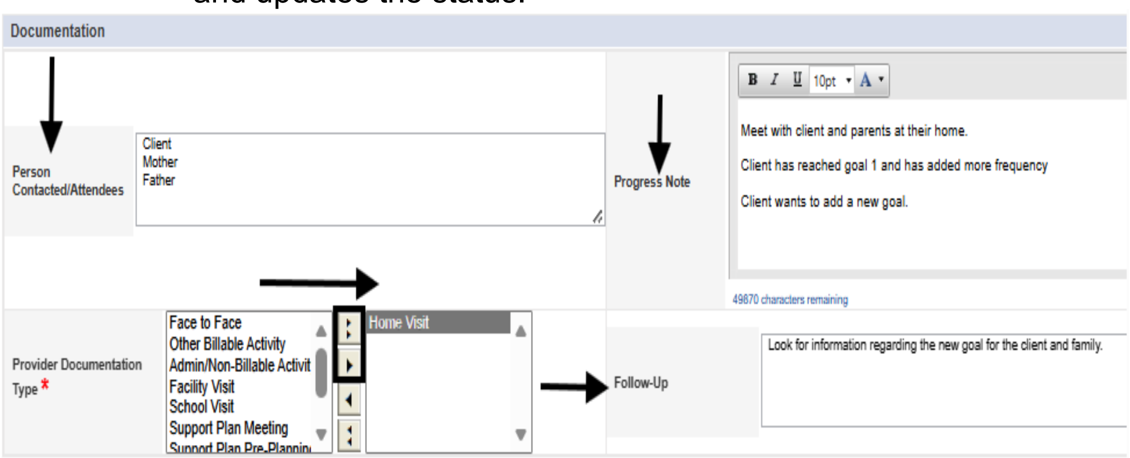

        i. The filters can be utilized to locate the appropriate Auth ID. Clicking the small plus sign on the left will display the service. Click the appropriate Support Coordination service. The Authorization ID is populated on the Provider Documentation details page.




    f. Associated Service = Waiver Support Coordination
    g. Documentation Type = Progress Notes
    h. If the Service did not populate, click the ellipsis and select the appropriate service.
    i. Units = enter 1




j. Person Contacted/Attendees = enter all attendees or individuals contacted.
k. Progress Note = input notes as outlined in the iBudget Handbook. If using the same Provider Documentation throughout the month, indicate the date of each entry in the Progress Note section.
l. Provider Documentation Type = select all that apply
m. Follow-up = enter as needed
n. Status = will remain Pending until the mentor or designee approves and updates the status.

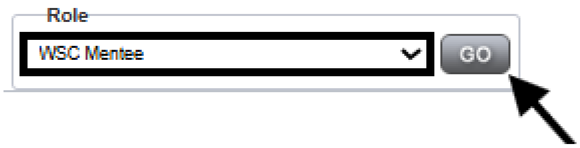



4. **File > Save and Close Provider Documentation**.

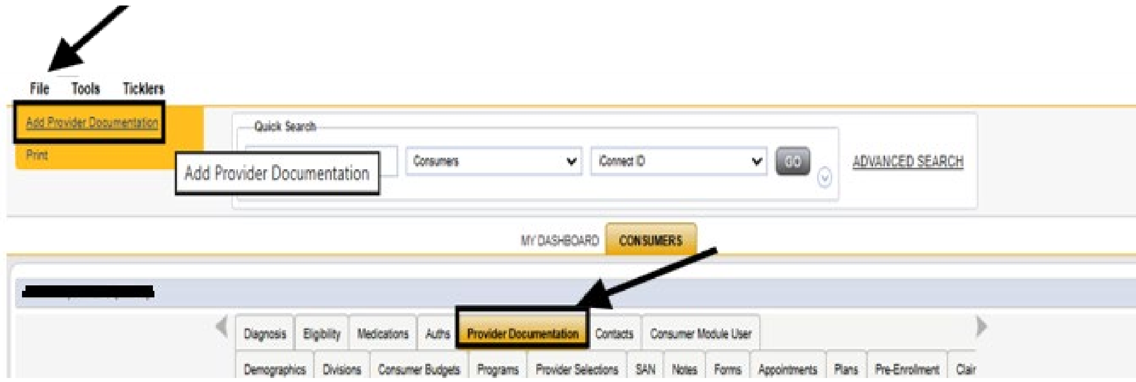
## Adding Provider Documentation without Using the Authorization

The authorization is used once a month. Additional contacts may be added to the Provider Documentation already created for the month, or another entry may be entered. If entering a separate entry, please follow the steps below. If this is the initial progress note, please review the section, [Adding Provider Documentation with Using the Authorization.]

1. To begin, log into iConnect and set Role = **WSC Mentee**. Click **Go.**




2. Navigate to the Consumer's record and click the **Provider Documentation > File > Add Provider Documentation.**




3. The Provider Documentation Details page is displayed. Update the following fields:
   a. Start Date = enter date
   b. Start Time = leave blank
   c. End Date = enter date
   d. End Time = leave blank
   e. Auth ID = leave blank

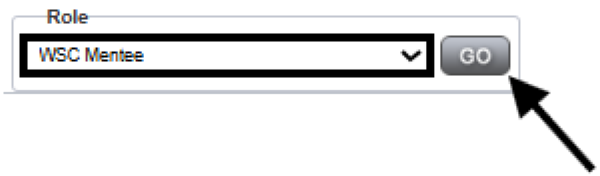

   f. Division = select APD
   g. Provider = select the QO name
   h. Worker = defaults to self
   i. Service = click the ellipsis to display a list of services. Select the Service Code 0000 = Non-Billable Progress Note Documentation.
      i. For non-billable activities utilize the 0000-NB service code
   j. Units = 1
   k. Person Contacted/Attendees = enter all attendees or individuals contacted.
   l. Progress Note = input notes as outlined in the iBudget Handbook.
   m. Provider Documentation Type = select all that apply
   n. Follow-up = enter as needed
   o. Status = will remain Pending until the mentor or designee approves and updates the status.

4. Click **File > Save and Close Provider Documentation**.

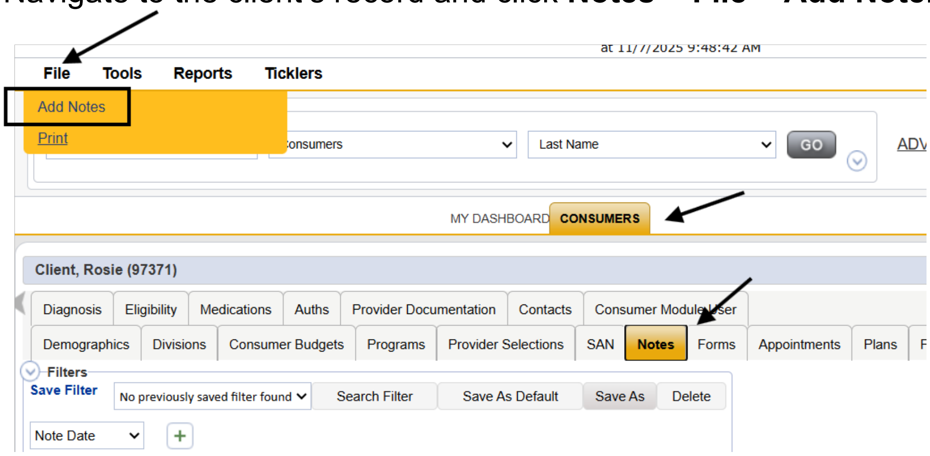
## WSC Mentee Role – Submit Items to Mentor

The WSC Mentor will need to review the progress notes by the WSC Mentee. The WSC Mentee can notify the WSC Mentor of the progress notes via a Note in iConnect.

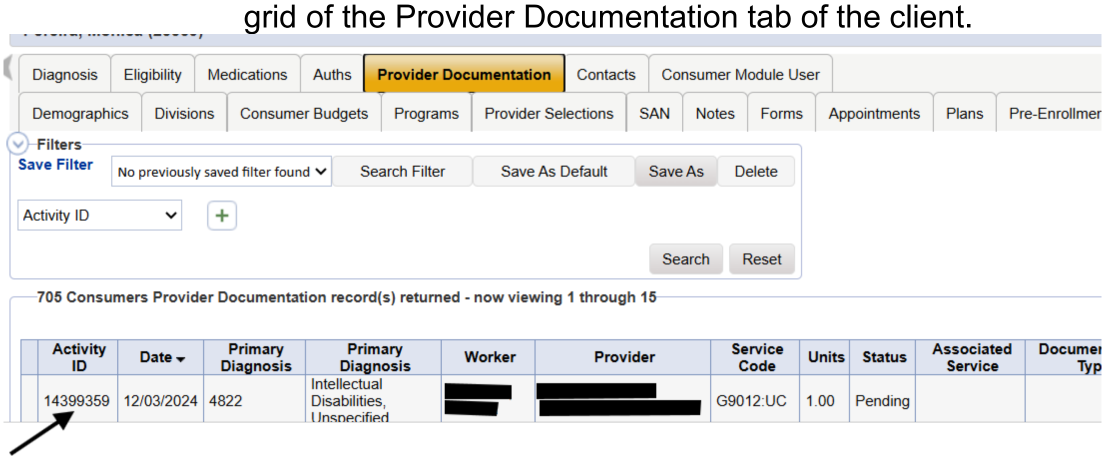
1. To begin, log into iConnect and set Role to **WSC Mentee**. Click **Go**.



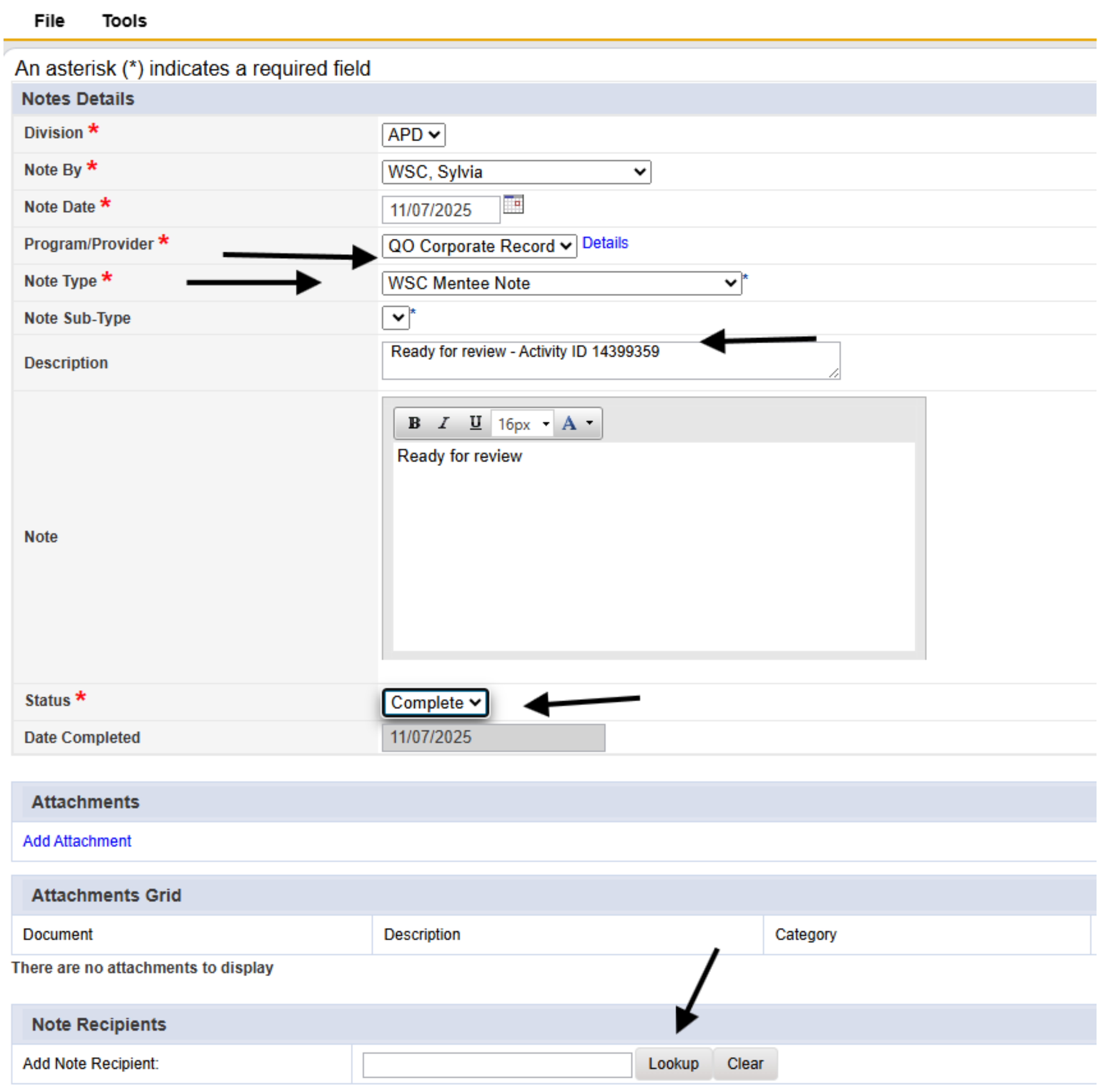

2. Navigate to the client’s record and click **Notes** > **File > Add Note.**



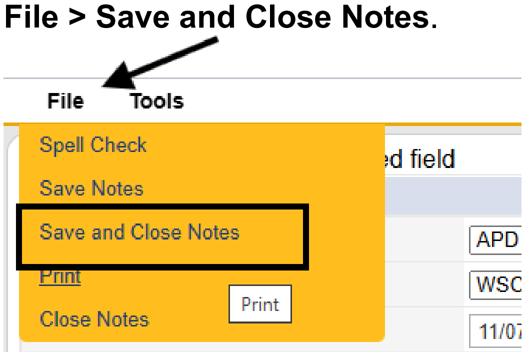

3. In the Notes details page update the following:
   a. Program/Provider = QO name
   b. Note Type = WSC Mentee Note
   c. Description = Ready for review - Activity ID # located in the list view grid of the Provider Documentation tab of the client.




   d. Notes = enter notes as needed
   e. Status = Complete
   f. Note Recipient = Mentor’s name




4. **File > Save and Close Notes**.



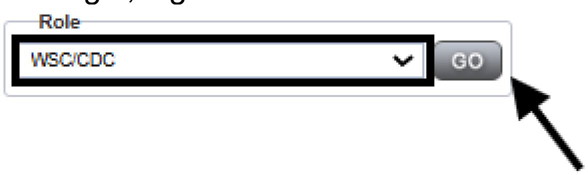
## WSC/CDC Role (Mentor) – Review Mentee's Provider Documentation

The WSC Mentor will need to review the progress notes by the WSC Mentee. The Mentor can receive a Note from the WSC Mentee or be notified outside of iConnect of the progress note ready for review.

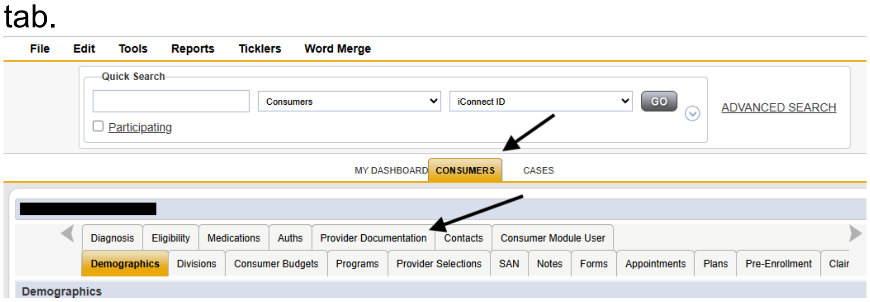
The Mentor will work with the WSC Mentee to assist in remediating any issues with the progress note as needed. Once the progress note is complete, the Mentor will:

- Mark the WSC Mentee's progress notes as complete,
- Enter the Mentor's name as the Mentor Reviewer and the date of which the progress note was reviewed to verify that the service was rendered as noted in the progress note.

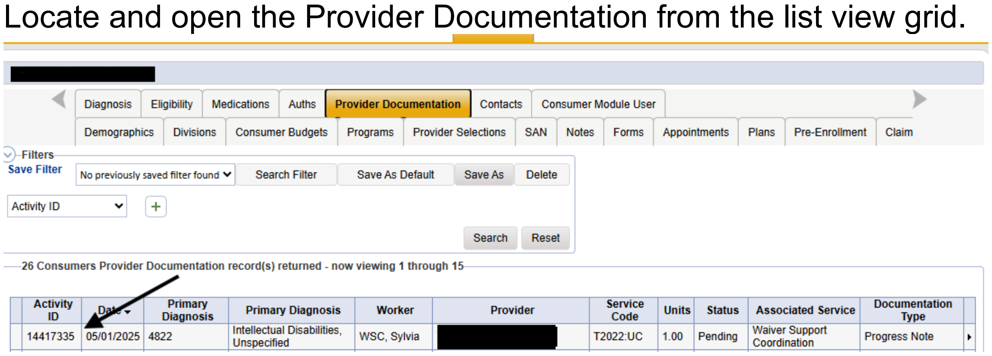
1. To begin, log into iConnect and set Role to **WSC/CDC**. Click **Go**.




2. Navigate to the Consumer's record and open the Provider Documentation tab.

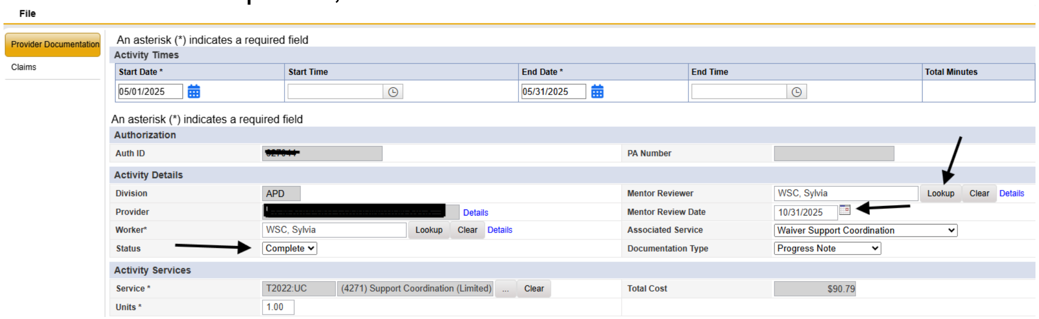



3. Locate and open the Provider Documentation from the list view grid.




4. Review the progress note. The mentor will verify the progress note by updating the following fields:
   a. Mentor Reviewer = search and enter the mentor's name
   b. Menter Review Date = enter date of review

c. Status = update to Complete
d. Once completed, **File > Save and Close Provider Documentation**



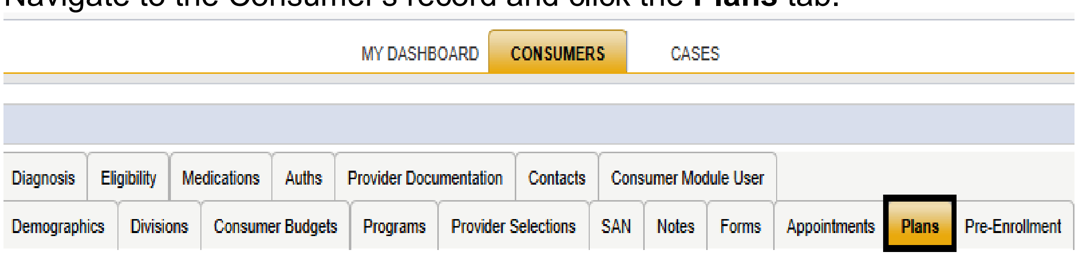

## WSC Mentee Role – Cost Plans, Planned Services and Plan Validation

The WSC Mentee will be able to review Cost Plans, add Planned Services and complete Plan Validation. The WSC Mentee will need to have the Mentor review the Cost Plan and the Mentor will then need to send the Cost Plan for review by the region once completed.

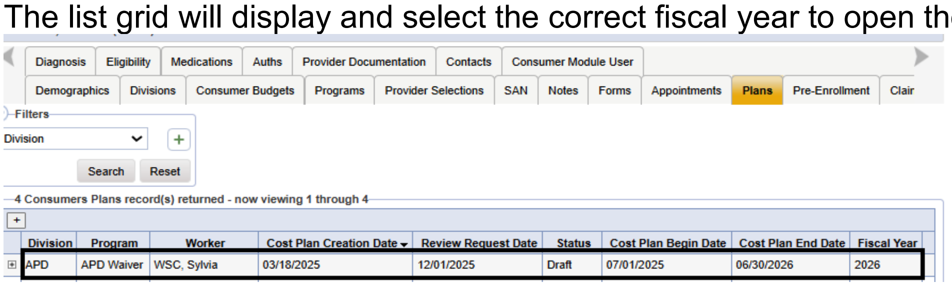
## Add Planned Services

1. To begin, log into iConnect and set Role to **WSC Mentee**. Click **Go**.

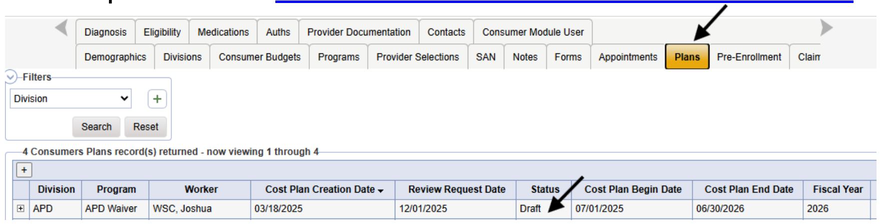

2. Navigate to the Consumer's record and click the **Plans** tab.




3. The list grid will display and select the correct fiscal year to open the plan.

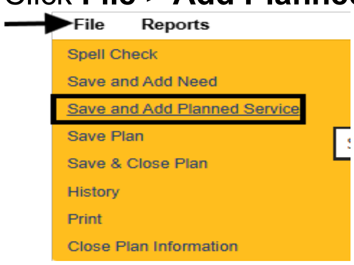


4. If the Plan is in the Complete status and updates are needed to be made, the WSC Mentee will need to change their role to **WSC Cost Plan Adjustment**. Follow the steps below in [As Needed: Reverse Status of Cost Plan](#).




5. On the **Planned Information** subpage. Verify that all information is complete and accurate.

6. Click **File > Add Planned Service**.

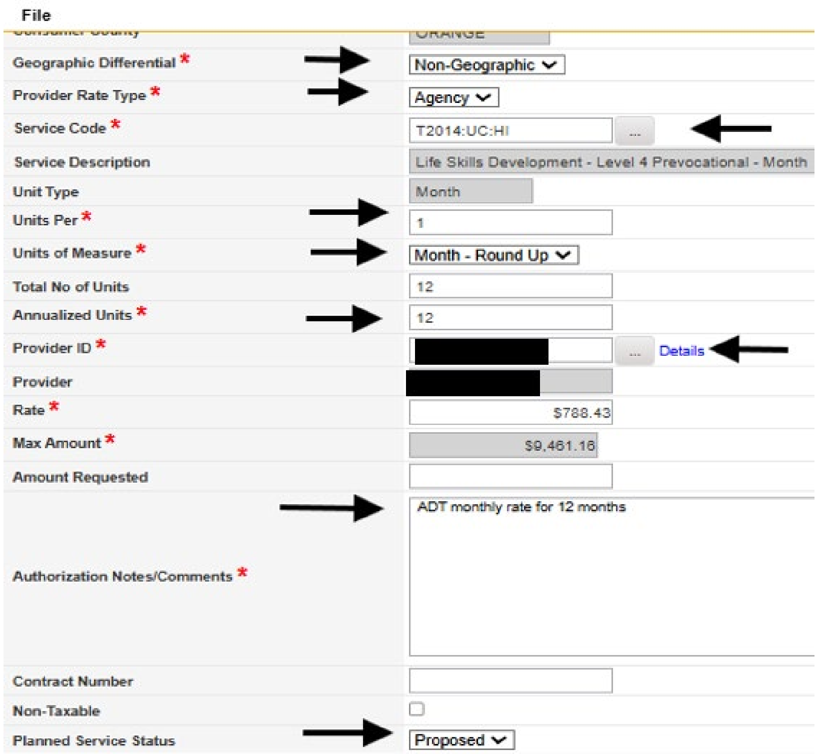



7. A new Planned Service record opens. Update the following fields:
   a. Fiscal Year = choose the applicable fiscal year
   b. Begin Date = enter the begin date of service
   c. End Date = enter the end date of service

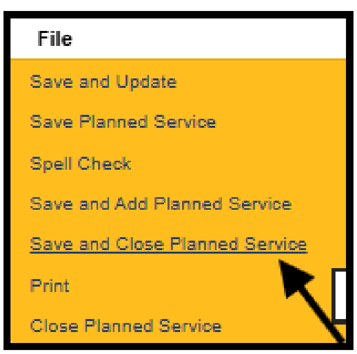
      *NOTE: The Start and End Dates of a Planned Service must be within the Cost Plan Begin and End Dates located on the Plan Information page.*

   d. Index/SubObject Code = click the ellipsis to search for the ISO code
   e. Service Ratio = as needed
   f. Consumer County = auto-populated
   g. Geographic Differential = enter as appropriate
   h. Provider Rate Type = select appropriate rate type
   i. Service Code = use the ellipse to search for and select the service code.
   j. Unit Type = auto-populates when service code is selected
   k. Unit Per = enter the identified number of units per period
   l. Unit of Measure = enter as appropriate
   m. Total No of Units = auto-populate
   n. Annualized Unites = enter as appropriate
   o. Provider ID = use the ellipsis to search for the service provider
      i. If the service provider is not known at the time Planned Services are being added, you can select *Pending Provider*
      ii. A valid service provider must be selected before creating authorizations

p. Rate = auto-populate and depending on the service code, may or may not be editable (if a negotiated rate or transportation enter as appropriate)
q. Max Amount = auto-populate
r. Authorization Notes/Comments = enter notes
s. Planned Service Status = Proposed




t. When finished, click **File > Save and Close Planned Service.**




8. Repeat the steps above for all relevant Providers/Services.

9. Planned Services can be created in iConnect before the Provider Selection Process if desired.
    a. The Provider = Pending Provider should be used until the actual provider is selected.

b. Once the actual provider is selected, remember to update the Provider Selection record for the provider from Referred to Open status.

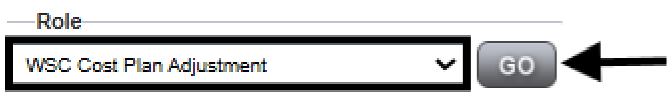
10. After a new service has been added to the cost plan, the budget needs to be unlinked and then relinked to the plan. Follow the steps outlined in Chapter 11 of the Case Management Manual for detailed instructions on creating and updating Cost Plans and how to unlink and link the budget.

11. Once the plan contains all necessary planned services, proceed to Plan Validation.

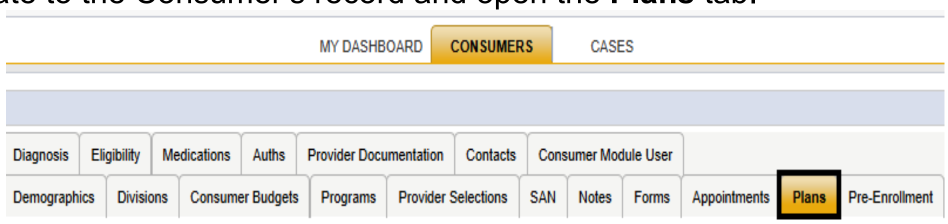
### As Needed: Reverse Status of Cost Plan

If the Plan is in the Complete status and updates are needed to be made, the WSC Mentee will need to change their role to **WSC Cost Plan Adjustment**.

1. To begin, log into iConnect and set Role to **WSC Cost Plan Adjustment**. Click **Go**.

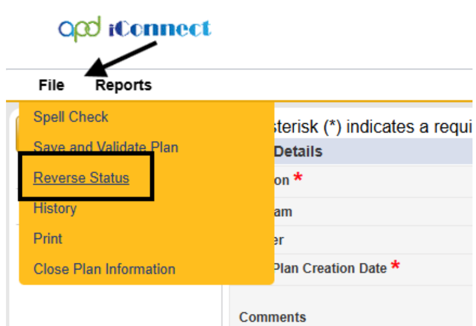



2. Navigate to the Consumer's record and open the **Plans** tab.




3. Open the Cost Plan from the list view grid.

4. Navigate to **File > Reverse Status**



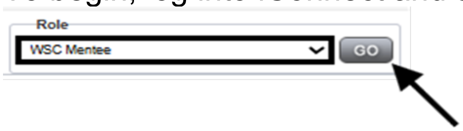

5. **File > Close Plan Information**

## Edit Planned Services

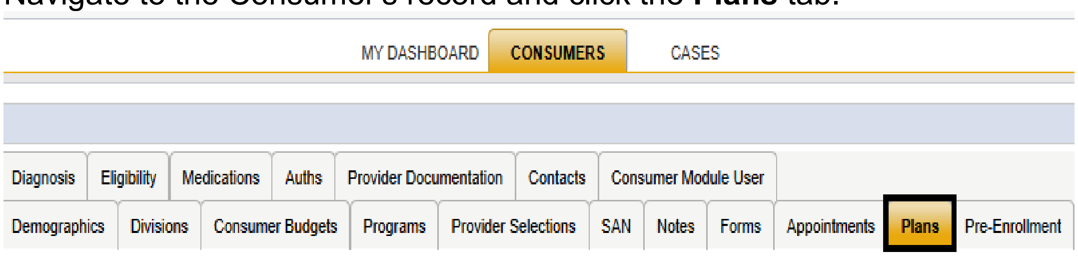
Planned services may be edited for several reasons. A planned service may exceed the budget, and the dates need editing to decrease the amount requested. A planned service may only be partially approved following a region or state office review, and the units may need to be decreased. Planned services are edited as a result of an approved provider expansion request. Regardless of the reason, the steps to edit the planned service are the same. Prior to making edits the WSC will need to reverse the status of the cost plan.

Follow the steps in [As Needed: Reverse Status of Cost Plan.]

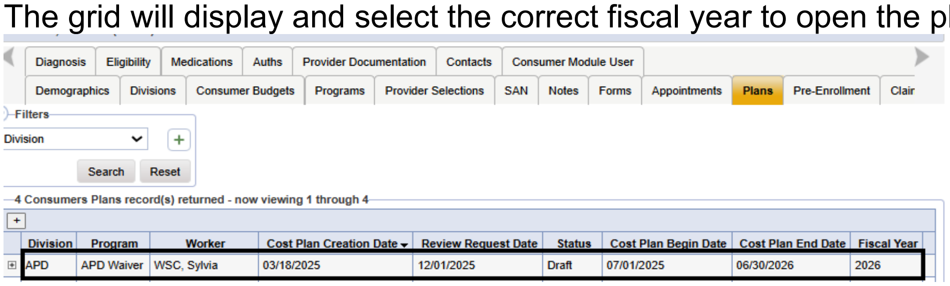
1. To begin, log into iConnect and set Role to **WSC Mentee**. Click **Go**.




2. Navigate to the Consumer's record and click the **Plans** tab.

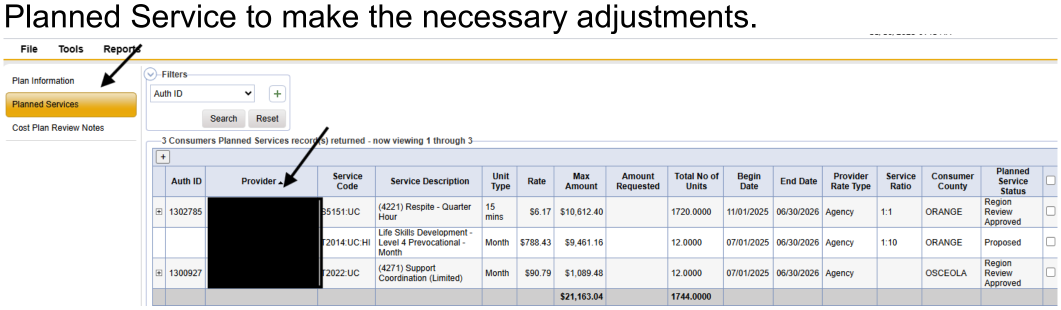



3. The grid will display and select the correct fiscal year to open the plan.



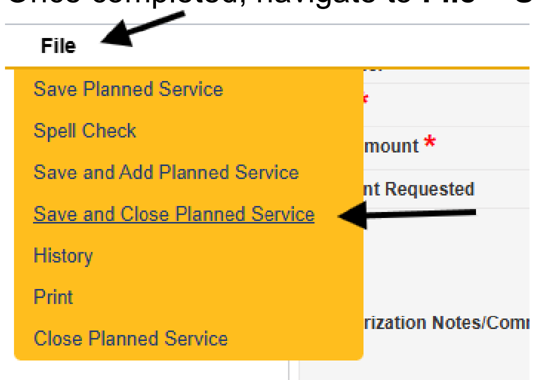

4. On the **Planned Information** subpage. Verify that all information is complete and accurate.

5. Navigate to the Planned Services bookmark and select the appropriate Planned Service to make the necessary adjustments.




6. Set the status to Proposed.


7. Once completed, navigate to **File > Save and Close Planned Services**



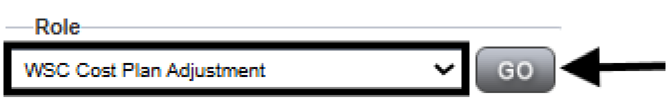

8. Once completed, proceed to [Plan Validation](#).

## Remove Planned Services

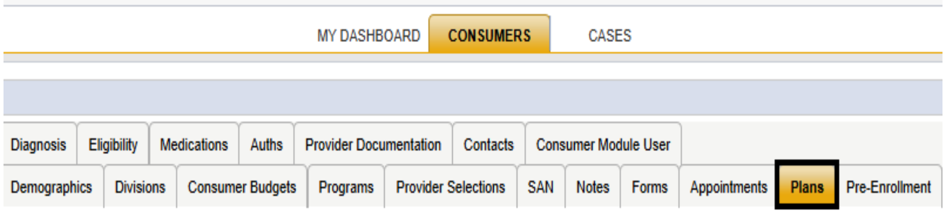
Planned services may need to be deleted when an error is made or when a planned service is denied. The Planned services must be removed from the Plan to be excluded from future plan validations. The WSC Mentee and other designated staff will have access to the WSC Cost Plan Adjustment role in iConnect. You cannot delete a planned service that has already been pushed to an authorization.

1. When a service is denied by the Region or State Office reviewer, the Mentee/Mentor will be notified by monitoring My Dashboard for incoming Notes.
   a. Note Type = Cost Plan Review.
   b. Sub Type = Not Approved.

2. To delete a planned service, select the **WSC Cost Plan Adjustment** role and click **Go**.



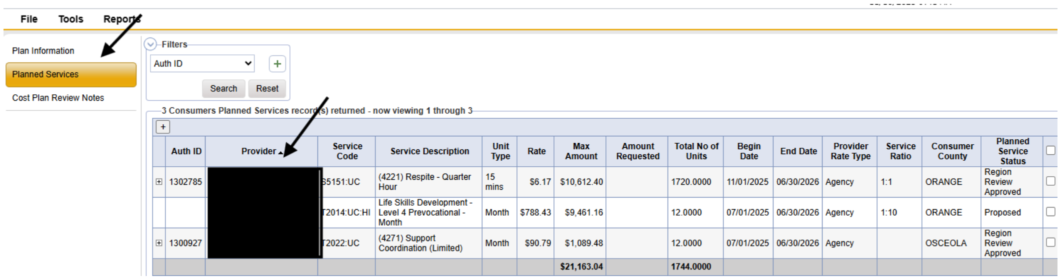

3. Navigate to the Consumer’s record and open the **Plans** tab.




4. Open the Cost Plan from the list view grid.

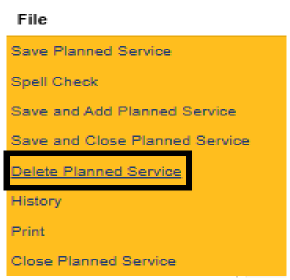
5. Open the plan record. Select the **Planned Services** subpage.

6. From the Planned Services list view grid, select the planned service that is denied or was added in error.




7. The **Plan Service Details** page will display.

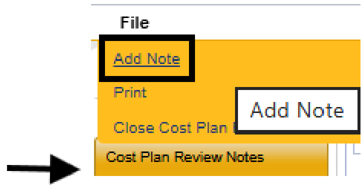
8. **File > Delete Planned Service**. The Planned Service Record is deleted. Document details of the planned service that was deleted in error or because it was denied in a Note.




9. A pop-up will appear. Click **OK**.


10. From the **Plan** record, select the **Cost Plan Review Notes** subpage.

11. From the **File** menu > select **Add Note:**

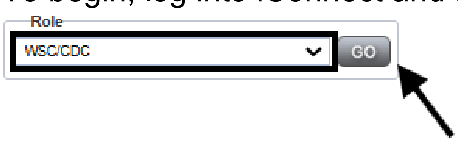



a. In the new Note record, update the following fields:
b. Division = APD
c. Note By = defaults to self
d. Note Date = defaults to today's date
e. Cost Plan Review Note = Yes
f. Note Type = Deleted Planned Services
g. Note = details of the services that were deleted because they were denied, or they were added in error
h. Status = Complete
i. When finished, click **File > Save and Close Notes**.

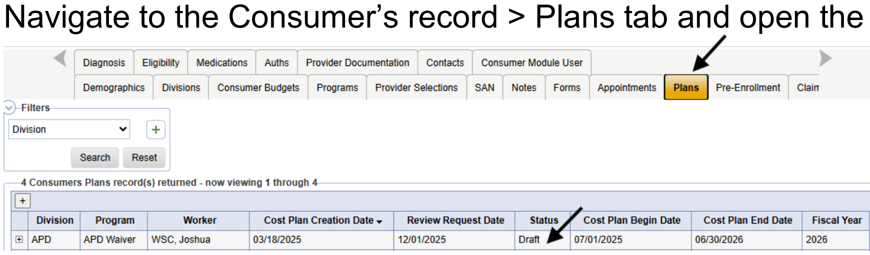
12. Edits have been made to the Plan, proceed to [Plan Validation](#).

## WSC/CDC Role (Mentor) – Cost Plans and Plan Validation Review

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




2. Navigate to the Consumer's record > Plans tab and open the plan.




3. Review the information in the Planned Services and Planned Information. Complete the Plan Validation Process. Add any supporting documentation for the Cost Plan Notes. Once completed, update the Status to Pending and update the worker to the Waiver Liaison. Compete the Cost Plan Review note. For more information on how to complete the Cost Plan Review note, please visit [Chapter 11 of the Case Management manual](#).

## WSC Mentee Role – Add SANs Request

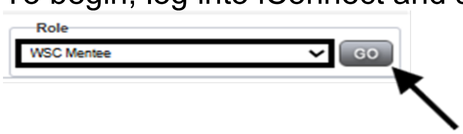
If a client has significant additional needs that exceed the algorithm amount or cannot be met within their current budget, the WSC Mentee submits a Significant Additional Needs (SAN) request. Prior to submitting a SAN request, the Waiver Support Coordinator should work with the consumer to:

1. Identify resources outside of the iBudget Waiver program to meet the individual's needs;
2. Address the individual needs within the existing budget; or
3. Move unallocated or unused funds to meet the needs.

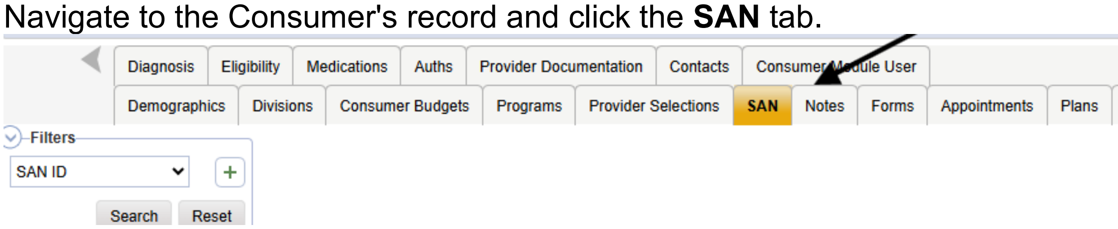
For more detail instructions on how to complete a SANs, please review the [APD iConnect SAN Training Guide for WSCs].

The WSC Mentee can begin the SANs process; however, the WSC Mentor will need to be added to the WSC SAN request and will review prior to Status being updated to Submitted.

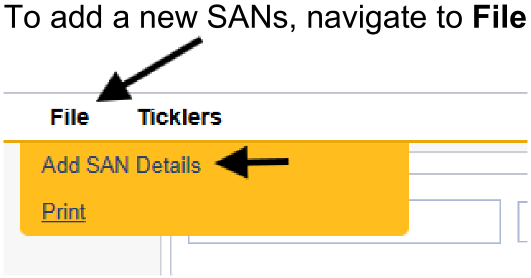
1. To begin, log into iConnect and set Role to **WSC Mentee**. Click **Go**.



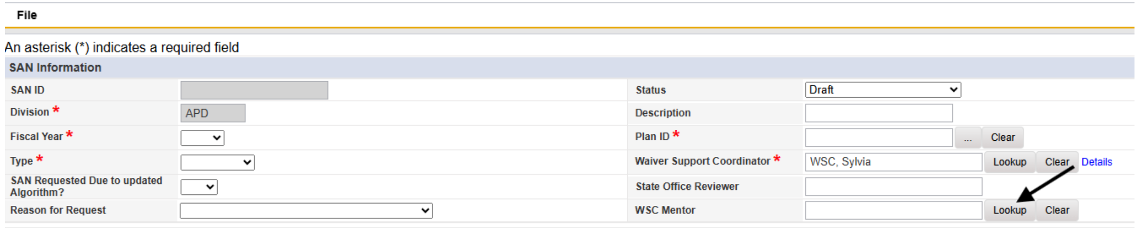

2. Navigate to the Consumer's record and click the **SAN** tab.




3. To add a new SANs, navigate to **File > Add SAN Details**



4. Fill out the SANs details and add the WSC Mentor to the SANs detail screen.




5. Complete the SANs as outlined in the [APD iConnect SAN Training Guide for WSCs] until the submission to State Office for review.

6. The WSC Mentor will review the SANs and then the WSC Mentee can proceed in submitting to State Office for review.