

PROFILE INFORMATION ENTRY INSTRUCTIONS

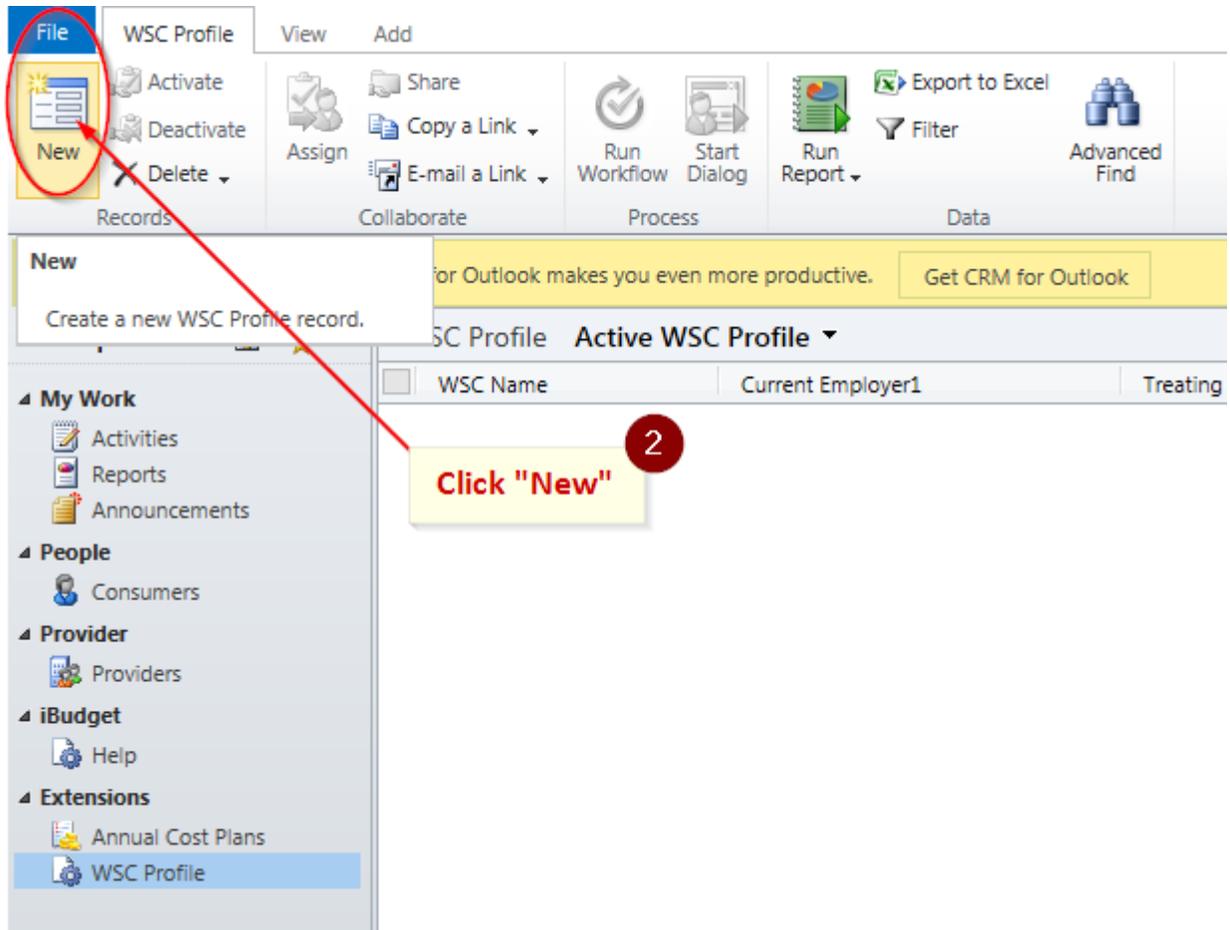
1. Please log in to iBudget.

On the bottom left side of the screen, you will see the “WSC Profile” menu item under “Extensions.” Click “WSC Profile.”

The screenshot displays the iBudget software interface. At the top, there is a ribbon menu with tabs for 'File', 'WSC Profile', 'View', and 'Add'. The 'File' tab is active, showing options like 'New', 'Activate', 'Deactivate', 'Delete', 'Assign', 'Share', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', 'Run Report', 'Export to Excel', 'Filter', and 'Advanced Find'. Below the ribbon is a yellow banner for 'CRM for Outlook'. The main interface is divided into a left sidebar and a main content area. The sidebar has sections for 'Workplace', 'My Work', 'People', 'Provider', 'iBudget', and 'Extensions'. The 'Extensions' section is expanded, showing 'Annual Cost Plans' and 'WSC Profile'. The 'WSC Profile' item is circled in red. A callout box with a red circle containing the number '1' points to the 'WSC Profile' item and contains the text 'Select "WSC Profile" under "Extensions"'. The main content area shows a table with columns for 'WSC Name', 'Current Employer1', and 'Treating'.

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2. Please click the “New” button in the top left corner of the screen to open your profile form.



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- The profile form will look like the picture below. Please fill in the requested information.
 - * If you work for more than one Waiver Support Coordination agency, please enter **all** agencies you work for. There is enough room to enter up to four WSC agencies.*
 - * Address requested is your **Residential Address** – not your business address. This information will be used to verify your identity when you set up your iConnect user account.*

The screenshot shows the 'WSC Profile New' form with the following fields and callouts:

- WSC Name:** Tester 1 Level 1. Callout: "Your name will already be filled out for you" (with a red circle containing the number 3).
- Current Employer1:** 1ST HOME HEALTH CARE, INC. Callout: "Select the agency you work for. If you are self-employed, enter your own business name. If you work for more than one agency, you may enter the others in the remaining 'Current Employer' boxes."
- Current Employer2:** (Empty)
- Current Employer3:** (Empty)
- Current Employer4:** (Empty)
- Unique Email Address (Should not be shared):** test@gmail.com. Callout: "Enter a unique email address (should not be a shared address)".
- DOB:** 8/1/1978. Callout: "Enter your date of birth".
- Treating ProviderID:** 123ABCD. Callout: "Enter your Treating Provider ID (your personal Provider ID)".
- RESIDENTIAL ADDRESS:**
 - Address Line1:** 1234 Test Dr. Callout: "Enter your residential address (this is not your business address, unless they are the same)".
 - City:** Tallahassee
 - State:** Florida
 - Zip:** 32311

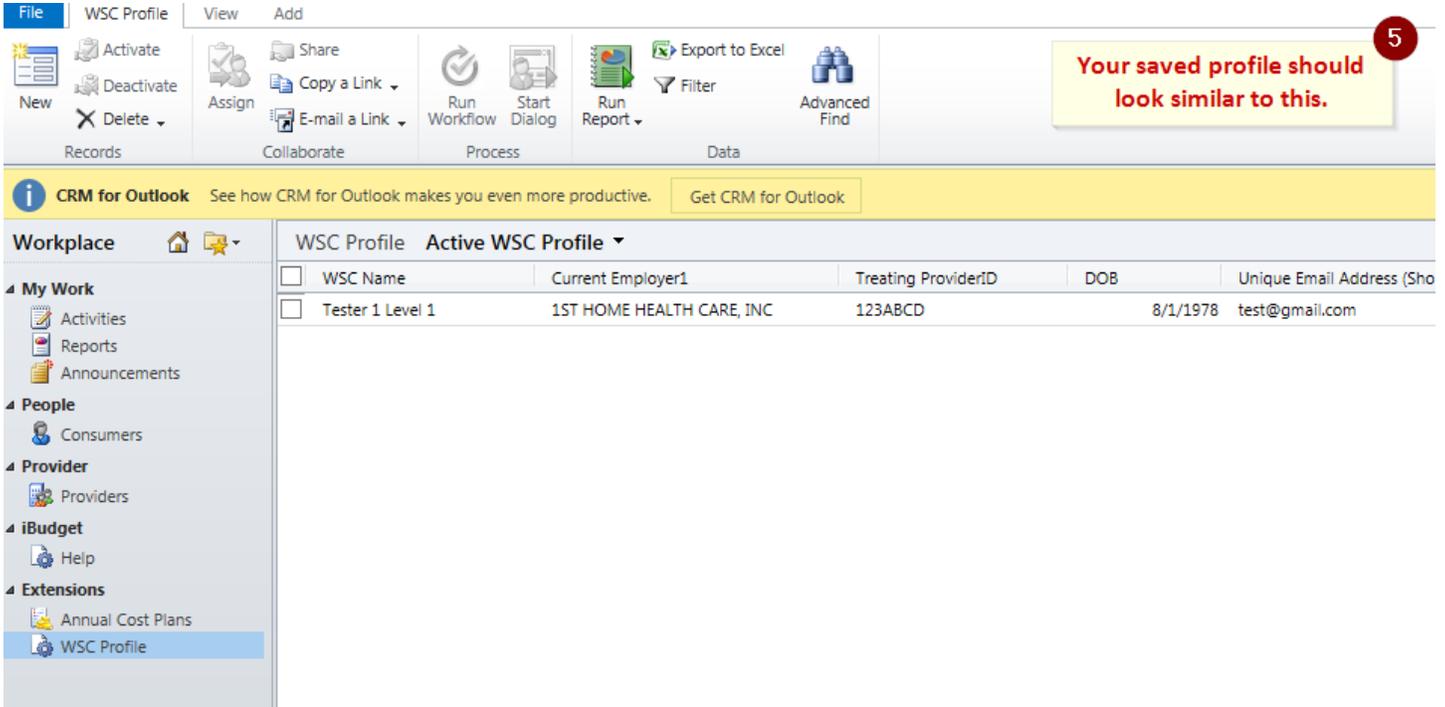
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- Click "Save" or "Save & Close" in the top left corner to save your profile information.

The screenshot shows the 'WSC Profile' entry form. The top navigation bar includes a 'File' menu with 'Save' and 'Save & Close' options. A red circle highlights these two options, and a yellow callout box with the number '4' points to them with the text 'Click "Save" or "Save & Close"'. The main form area is titled 'WSC Profile New' and contains several input fields under the 'General' section: 'WSC Name' (filled with 'Tester 1 Level 1'), 'Current Employer1*', 'Current Employer2', 'Current Employer3', 'Current Employer4', 'DOB*', and 'Treating ProviderID*'. Below this is the 'RESIDENTIAL ADDRESS' section with fields for 'Address Line1*', 'Address Line2', 'City*', 'State*', and 'Zip*'. The left sidebar shows 'Information' (General, Notes) and 'Related' (Common, Activities, Closed Activities) sections. The top right corner shows the user 'Tester 1 Level 1' and 'APD'.

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5. Your profile record will look like the picture below.



The screenshot shows the CRM for Outlook interface. The top ribbon includes 'File', 'WSC Profile', 'View', and 'Add' tabs. The 'File' tab is active, showing options like 'New', 'Deactivate', and 'Delete'. The 'WSC Profile' tab shows options like 'Assign', 'Copy a Link', and 'E-mail a Link'. The 'View' tab shows 'Run Workflow', 'Start Dialog', and 'Run Report'. The 'Add' tab shows 'Export to Excel', 'Filter', and 'Advanced Find'. A yellow callout box in the top right corner contains the text: "Your saved profile should look similar to this." with a red circle containing the number 5.

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Workplace  

WSC Profile Active WSC Profile

<input type="checkbox"/>	WSC Name	Current Employer1	Treating ProviderID	DOB	Unique Email Address (Sho
<input type="checkbox"/>	Tester 1 Level 1	1ST HOME HEALTH CARE, INC	123ABCD	8/1/1978	test@gmail.com

My Work
Activities
Reports
Announcements

People
Consumers

Provider
Providers

iBudget
Help

Extensions
Annual Cost Plans
WSC Profile