

Assessments – Notes and Provider Documentation

When a provider is authorized to provide an Assessment, the provider shall document this service as outlined below.

Assessments are documented using Notes to attach the Assessments and Provider Documentation to document the time period in which the assessment was conducted.

The following instructions will outline how to complete the steps necessary to include this information into a Consumer's record using APD iConnect.

1. To begin, log into APD iConnect and set Role = Service Provider or Service Provider Worker. Click **Go**
2. Navigate to the Consumer's Record and click the **Note** tab > click **File > Add Note**
3. The Note Details page is displayed. Update the following fields:
 - a. Program/Provider = Name of your Agency
 - b. Note Type = Specialty Assessments/Treatment Plans
 - c. Note Subtype = Select the applicable service
 - i. Dental
 - ii. Dietician
 - iii. Environmental Accessibility Adaptation
 - iv. Nursing
 - v. Occupational Therapy
 - vi. Physical Therapy
 - vii. Respiratory
 - viii. Specialized Mental Health
 - ix. Speech Therapy
 - d. Description = Service Assessment conducted on MM/DD/YY
 - i. *Ex. Speech Therapy Assessment conducted on 05/06/2022*

- ii. *This note type is also used to attach a Nursing Plan of Care.*
- e. Status = Complete
- f. Attach Service Assessment to this Note
 - i. *If the assessment is a physical document, the provider will need to scan this document and save as a file on their desktop prior to beginning adding this note.*
- g. Note Recipient = Waiver Support Coordinator
 - i. *If the organization providing services requires that the staff include additional Note Recipients, repeat the necessary steps to include those note recipients now.*

h. File > Save and Close Note

File Tools	
Notes Details	
Division *	APD ▾
Note By *	▾
Note Date *	06/24/2022 📅
Program/Provider *	Provider - 18914 ▾ Details
Note Type *	Speciality Assessments/Treatment Plans ▾*
Note Sub-Type	Nursing ▾
Description	Nursing Assessment conducted 06/22/2022

4. Navigate to the Consumers record and click the **Provider Documentation** tab > click **File > Add Provider Documentation**.
5. The Provider Documentation Details page is displayed. Update the following fields:
 - *** *The Start and End Date should reflect the date in which assessment was conducted.*
 - a. Start Date: Defaults to today and is editable
 - b. Start Time: Enter if Unit type = 15 min or Hourly.
 - c. End Date: Defaults to today and is editable
 - d. End Time: Enter if Unit type = 15 min or hourly.
 - e. Click **Add**

6. Click the Auth ID ellipsis to display a list of authorizations.
7. Click on the appropriate Authorization. The Authorization ID is populated on the Provider Documentation details page.
8. Click the Service ellipsis to display a list of services for this authorization. Select the Service.
 - f. The Activity Services details are populated on the Provider Documentation details page.
9. Verify/update the number of Units as needed. Note the Total Cost value changes as the number of Units change.

The screenshot shows the 'Provider Documentation' page in the iConnect system. It includes sections for 'Activity Times', 'Authorization', 'Activity Details', and 'Activity Services'. A 'DialogVendorServiceSelectPopUp' window is open, displaying a table of services with columns for ServiceID, ServiceCode, SecondaryCode, Service, UnitCost, UnitType, EffectiveDate, EndDate, SvcStartDate, SvcEndDate, VServiceID, AuthServiceID, MaxAuth, Used, and Remaining. The table contains one row of data for a 'Skilled Nursing - Assessment' service.

ServiceID	ServiceCode	SecondaryCode	Service	UnitCost	UnitType	EffectiveDate	EndDate	SvcStartDate	SvcEndDate	VServiceID	AuthServiceID	MaxAuth	Used	Remaining
5869	T1001:UC:HO	T1001:UC:HO	(4230) Skilled Nursing - Assessment	7.28	15 mins	06/05/2022	06/09/2022	06/30/2022	250674	155975	2	0.00	2.00	

10. Provider Documentation Type = Progress Note

11. Note = "Please see full assessment attached to the { MM/DD/YY} "Specialty Assessments/Treatment Plans" note on the Notes tab."

The screenshot shows the 'Documentation' section of the iConnect interface. On the left, there is a list of documentation types including 'Annual Report', 'Daily Attendance Log', 'Monthly R&B', 'Monthly Summary', 'Quarterly Summary', 'Service Log', and 'Trin Log'. The 'Progress Note' type is selected. On the right, there is a text area for entering a note, containing the text: "Please see full assessment attached to the 06/24/2022 "Specialty Assessments/Treatment Plans" note on the Notes tab." Below the text area, it indicates "4983 characters remaining".

12. Status = Complete.

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