# Monthly Data for the Behavior Analyst – Notes and Provider Documentation

Monthly Data collected by the Behavior Assistant are communicated using Notes in iConnect:

Please refer to the [Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook](#) *for specific documentation requirements.*

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

2. Navigate to the Consumer's Record

    a. Type the consumer's last name in the Quick Search text field (1st field on the left)

    b. Ensure that the second field contains Consumers, third field contains last name and click "Go

    c. If there are multiple individuals with the same last name, select the appropriate record from the list view grid.
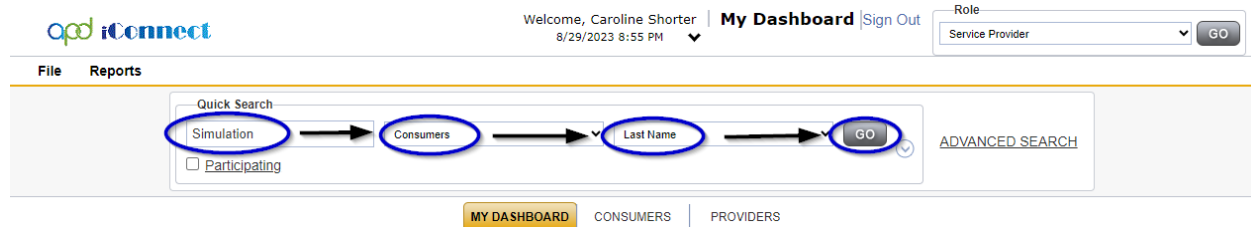
3. Click the **Note** tab > click **File > Add Note**
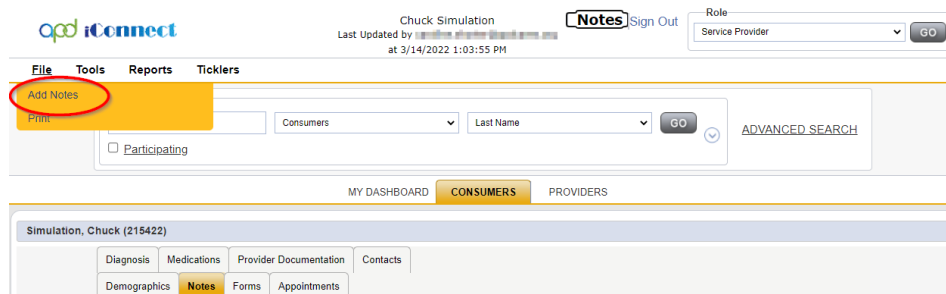
The Note Details page is displayed. Update the following fields:

    a. Program/Provider = Name of your Agency

If the Program/Provider is not available – contact the WSC to have a Provider Selection Record for your organization added to the consumer's record.

   b. Note Type = *Behavior Services*

Notes Details	
Division *	APD
Note By *	▮▮▮▮, ▮▮▮▮
Note Date *	08/29/2023
Program/Provider *	A Test Provider Details
Note Type *	Behavioral Services *
Note Sub-Type *	Behavioral Data
Description	Monthly Data provided to BA for 05/01/2022 – 05/30/2022

c. Note Subtype = Behavior Data

d. Description = Monthly Data provided to BA for MM/DD/YY-MM/DD/YY

    i. *Ex. Monthly Data provided to BA for 05/01/2022 – 05/30/2022*

e. Status = Complete

f. Attach the monthly data to this Note

    i. Use the "Add Attachment" link provided to search for the documents on your desktop.

    ii. File Upload Window opens, click the Choose File button, and locate the document on your computer's local files using the windows explorer

    iii. Select the File and click the open button

        1. The document is listed in the File field

            a. *OPTIONAL*: Use the File Name and Description fields to update the name and description of the files, if needed

                i. File Name = Select Create New & type the new name of the file.

                    1. Ensure that you include the file extension at the end of the file name

                        a. Ex.   MayStaffing.pdf

                        b.   Ex.   MayStaffing.docx

                ii. Description = Type in a description in the text box

    iv. Click Upload

        1. The File name will be listed as a Document.
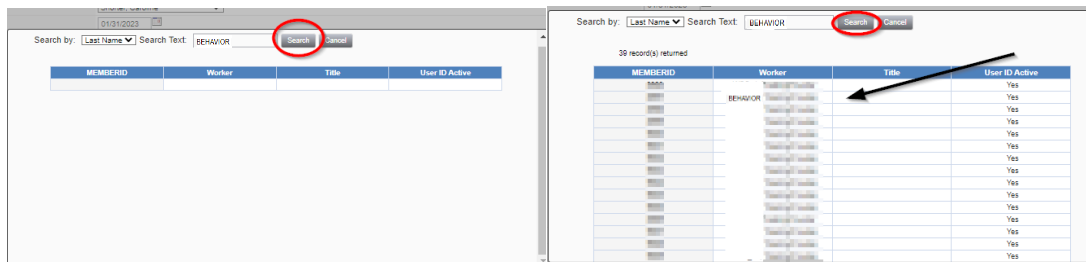
*IMPORTANT: When attaching a file in iConnect, please **do not include <u>any</u> <u>punctuation or special characters in the name of the file</u>**. This will ensure the file can be opened and viewed by other iConnect users, including Qlarant.*

*Additionally, **do not** password protect the documents as iConnect is an encrypted system.*

g. Note Recipient = behavior analysis service provider's

Note Recipients				
Add Note Recipient:		...	Clear	
Name	Date Sent	Date Read	Status	Date Signed
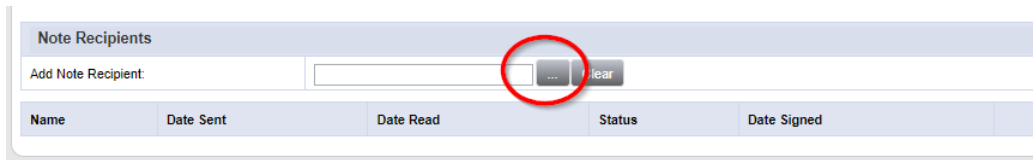
    i. Use the Add Note Recipient ellipsis (three dots) button to open the worker search popup.

    ii. Type the behavior analysis service provider's last name and click the search button.

        1. A list people with the last name will appear in the grid below.

    iii. Double click on the behavior analysis service provider's name to include the behavior analysis service provider as a Note Recipient. In this example, we searched for individuals with the last name equal to WSC.

        1. The behavior analysis service provider's name will now appear in the last field as a Note Recipient.

            a. If an error was made, delete the selection, and add a new note recipient.

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

apd iConnect

Chuck Simulation | **Notes**
8/29/2023 8:52 PM

File   Tools

Notes Details

Division *	APD ⌄
Note By *	[redacted] ⌄
Note Date *	08/29/2023
Program/Provider *	A Test Provider ⌄ Details
Note Type *	Behavioral Services ⌄ *
Note Sub-Type *	Behavioral Data ⌄
Description	Monthly Data provided to BA for 05/01/2022 – 05/30/2022

Note

B *I* U̲ 16px ⌄ **A** ⌄

Status *	Complete ⌄
Date Completed	08/29/2023

Attachments

Add Attachment

Document	Description	Category	Action
BehaviordataMay2022	Data Collected at ResHab		Remove

Note Recipients

Add Note Recipient: [   ] [...] [Clear]

Name		Date Sent	Date Read	Status	Date Signed	
BEHAVIOR	Worker	8/29/2023		Unread		Remove