

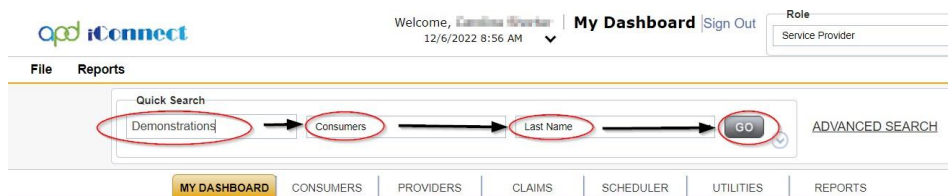
Assessments – Notes and Provider Documentation

Assessments are documented using 2 tabs in iConnect:

- **Notes** to attach the assessment and
- **Provider Documentation** to document the time period in which the assessment was conducted.

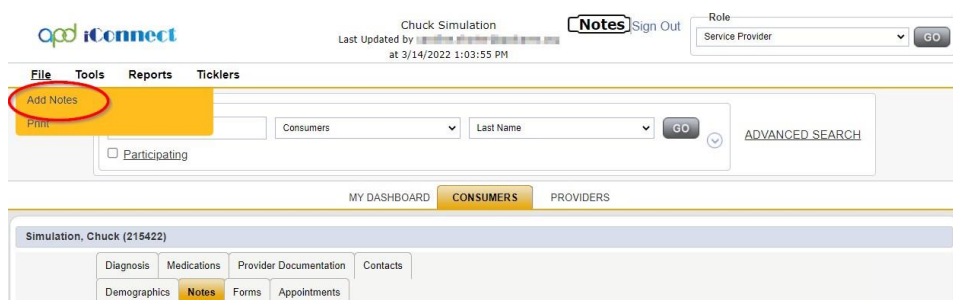
Please refer to the [Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook](#) for specific documentation requirements.

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"



The screenshot shows the iConnect Quick Search interface. The search bar contains the text "Demonstrations" in the first field, "Consumers" in the second field, and "Last Name" in the third field. A "GO" button is highlighted with a red circle. The interface also shows a "Role" dropdown menu set to "Service Provider" and a "Sign Out" link.

3. Click the **Note** tab > click **File > Add Note**




The screenshot shows the iConnect Add Note interface. The "Add Notes" button is highlighted with a red circle. The interface displays the consumer's name "Simulation, Chuck (215422)" and the "Notes" tab is selected. The "Add Notes" button is highlighted with a red circle. The interface also shows a "Role" dropdown menu set to "Service Provider" and a "Sign Out" link.

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 = Specialty Assessment/Treatment Plans
 - i. This note type is also used to attach a Nursing Plan of Care.

Notes Details	
Division *	APD ▼
Note By *	Simulation, Working
Note Date *	12/13/2022 
Program/Provider	Simulation Therapeutic Provider ▼ Details
Note Type *	Speciality 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 Therapy
 - 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*
- e. Status = Complete
- f. Attach assessment 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.
 - *Ensure that you include the file extension at the end of the file name*

Assessments – Notes and Provider Documentation

- *Ex. MayAssessment.pdf*
- *Ex. MayRx.docx*

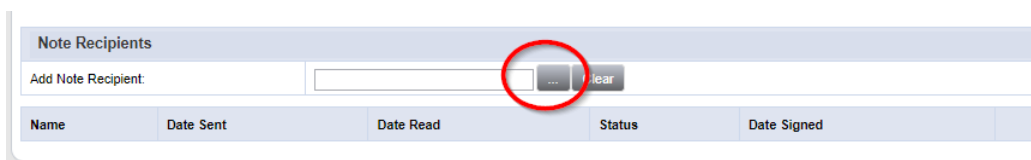
ii. Description = Type in a description in the text box

iv. Click Upload

1. The File name will be listed as a Document.

IMPORTANT: When attaching a file in iConnect, please **do not include any punctuation or special characters in the name of the file**. This will ensure the file can be opened and viewed by other iConnect users, including Qlarant.

g. Note Recipient = Waiver Support Coordinator



i. Use the Add Note Recipient ellipsis (three dots) button to open the worker search popup.

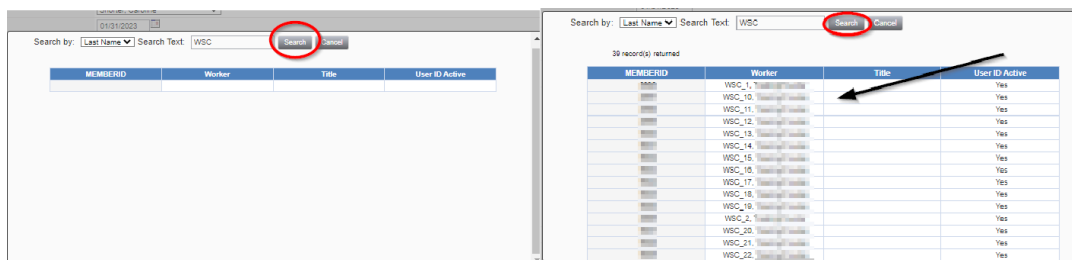
ii. Type the WSC's last name and click the search button.

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

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

1. The WSC'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

Notes Details

Division *	APD ▼
Note By *	Simulation, Working
Note Date *	12/13/2022 <input type="text"/>
Program/Provider	Simulation Therapeutic Provider Details
Note Type *	Speciality Assessments/Treatment Plans ▼*
Note Sub-Type	Nursing ▼
Description	Residential Nursing Assessment conducted on 05/06/2022 by Working Simulation

Note

New Text

B *I* U 16px A ▼

Append Text to Note

Status *	Pending ▼
Date Completed	<input type="text"/>

Attachments

[Add Attachment](#) ↔

Document	Description	Category	Action
ResidentialNursingAssessment.pdf	Working Simulation		Remove

Note Recipients

Add Note Recipient: ... Clear

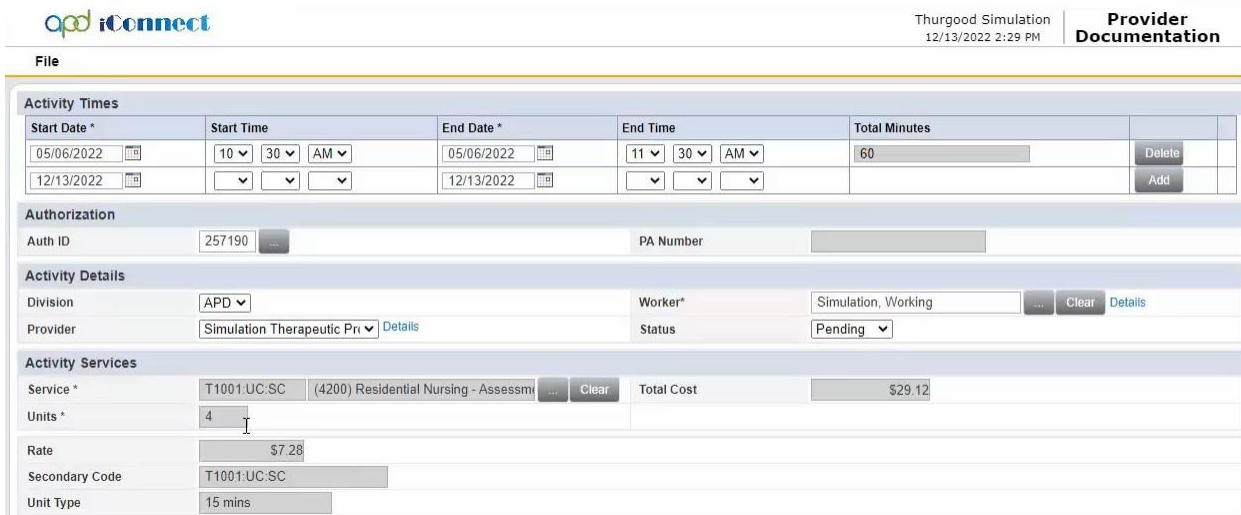
Name	Date Sent	Date Read	Status	Date Signed	
WscPlaceholder, Suncoast	12/13/2022		Unread		Remove

4. Click the **Provider Documentation** tab > click **File > Add Provider Documentation**.
5. The Provider Documentation Details page is displayed. Update the following fields:

The date is the date that the service was provided, and the time is the time in which the service was provided.

 - a. Start Date: Defaults to today and can be changed
 - b. Start Time: Select from dropdown menu
 - c. End Date: Defaults to today and can be changed
 - d. End Time: Select from dropdown menu
 - e. Click **Add**

6. Click the box next to the Auth ID field that contains an ellipsis (three dots) 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 box next to the Service field that contains an ellipsis (three dots) 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 are added.



APD iConnect Thurgood Simulation
12/13/2022 2:29 PM **Provider Documentation**

File

Activity Times

Start Date *	Start Time	End Date *	End Time	Total Minutes	
05/06/2022	10:30 AM	05/06/2022	11:30 AM	60	Delete
12/13/2022		12/13/2022			Add

Authorization

Auth ID: 257190 PA Number: [Redacted]

Activity Details

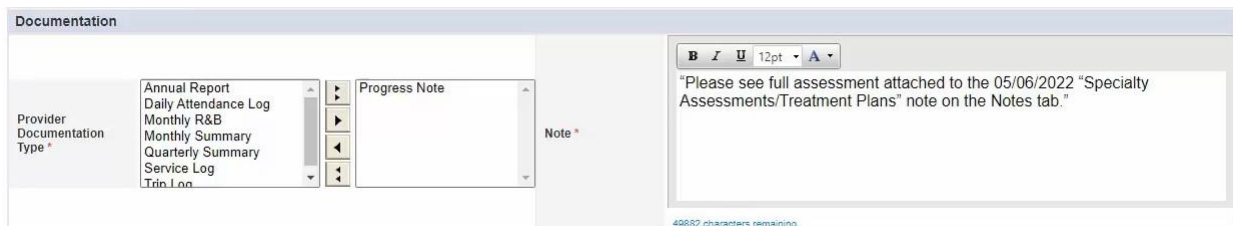
Division: APD Worker*: Simulation, Working
 Provider: Simulation Therapeutic Pri Status: Pending

Activity Services

Service *: T1001:UC:SC (4200) Residential Nursing - Assessm... Clear Total Cost: \$29.12
 Units *: 4
 Rate: \$7.28
 Secondary Code: T1001:UC:SC
 Unit Type: 15 mins

10. Provider Documentation type = Progress Note
11. Note - "Please see full assessment attached to the {MM/DD/YYYY} "Specialty Assessments/Treatment Plans" note on the Notes tab."

The date is the date that the service was provided.



Documentation

Provider Documentation Type: Annual Report, Daily Attendance Log, Monthly R&B, Monthly Summary, Quarterly Summary, Service Log, Trn Log

Note *

"Please see full assessment attached to the 05/06/2022 "Specialty Assessments/Treatment Plans" note on the Notes tab."

49882 characters remaining

Status = Complete.

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