

## Documenting Emergency Response Systems, Environmental Accessibility Adaptations (EAA), Durable Medical Equipment (DME), Consumable Medical Supplies (CMS), and Adult Dental Services as Notes

Service Logs (sometimes referred to as invoices), Prescriptions, and Treatment Plans, Records and any other documentation for billing must be included in iConnect as a note.

Please refer to the <u>Developmental Disabilities Individual Budgeting Waiver Services</u> <u>Coverage and Limitations Handbook</u> 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 (1<sup>st</sup> field on the left)
  - b. Ensure that the second field contains Consumers, third field contains last name and click "Go

opd iConnect	Welcome, Canadas Bractas   My 12/6/2022 8:56 AM 🗸	Welcome, Control Welcome, Wy Dashboard Sign Out		
File Reports				
Quick Search Demonstrations	Last Name	<b>6</b> 0	ADVANCED SEARCH	
MY DASHBOARD CONSL	MERS PROVIDERS CLAIMS	SCHEDULER UTILITIES	REPORTS	

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

opd iConnect	Chuck Simulation Last Updated by at 3/14/2022 1:03:55 PM	GO
<u>File</u> Tools Reports Tick	lers	
Add Notes Print	Consumers   Last Name  GO  ADVANCED SEARCH	
	MY DASHBOARD CONSUMERS PROVIDERS	
Simulation, Chuck (215422) Diagnosis Medications Demographics Notes	Provider Documentation Contacts Forms Appointments	

- 4. The Note Details page is displayed. Update the following fields:
  - a. Program/Provider = Name of your Agency

Updated February 7, 2024



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. Update the Note Type and Subtype in accordance with the instructions below. <u>Notice that instructions are separated by provider type.</u>
  - i. <u>Dental and Environmental Accessibility Adaptations (EAA)</u> providers will use:
    - 1. Note Type = Specialty Assessment/Treatment Plans
    - 2. Note Subtype = Dental or Environmental Accessibility Adaptation

Notes Details	
Division *	APD V
Note By *	Rhanim, Caroline 🗸 🗸
Note Date *	01/31/2023
Program/Provider *	A Test Provider
Note Type *	Speciality Assessments/Treatment Plans 🗸
Note Sub-Type	Environmental Accessibility Adaptation 🗸
Notes Details	
Division *	APD V
Note By *	filmatur, Garnina 🗸 🗸
Note Date *	01/31/2023
Program/Provider *	A Test Provider
Note Type *	Speciality Assessments/Treatment Plans
Note Sub-Type	Dental v
Description	Title of Document Required for Billing for example Dental Treatment Plan

- *ii.* Emergency Response Systems, Durable Medical Equipment (DME), Consumable Medical Supplies (CMS) providers will use:
  - 1. Note Type = Service Provider Supporting Documentation
  - 2. Note Subtype = leave blank
- c. Description = The name of the documentation required for billing
  - i. Ex. Dental Treatment Plan
  - ii. Ex. CMS Invoice for [insert date]



Notes Details	
Division *	APD 🗸
Note By *	linin linin 🗸 🗸
Note Date *	01/31/2023
Program/Provider *	A Test Provider 🗙 Details
Note Type *	Speciality Assessments/Treatment Plans
Note Sub-Type	✓
Description	Title of Document Required for Billing for example CMS Invoice for May 2022
	<b>В</b> <i>I</i> <u>Ш</u> 16рх - А -

- d. Status = Complete
- e. Attach documents 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.
  - iii. Select the File and click the open button
    - 1. The document is listed in the File field
      - a. <u>OPTIONAL</u>: 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. MayInvoice.pdf
            - b. Ex. MayInvoice.docx
        - ii. Description = Type in a description in the text box
  - iv. Click Upload
    - 1. The File 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.

f. Note Recipient = Waiver Support Coordinator

Updated February 7, 2024



Note Recipier	its		$\sim$			
Add Note Recipier	ıt:			lear		
Name	Date Sent	Date Read	$\smile$	Status	Date Signed	

- 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.

Search by: Last Name V Search Text VISC Search Cancer MEMIERID Worker Title User ID Active	Search by: Last Name 🗙 Search	ch Text: WSC	Search Cancel	
MEMBERID Worker Tile User ID Addive	1			
MEMBERID Worker Title User ID Active				
	39 record(s) returned			
	MEMBERID	Worker	Title	User ID Active
	6665	WSC_1, "Institution in the line		Yes
	1000	WSC_10.		Yes
	100	WSC_11,		Yes
		WSC_12,		Yes
	-	WSC_13.		Yes
	-	WSC_14.		Yes
		WSC_15.		Yes
	-	WSC_18,		Yes
	-	WSC_17,		Yes
	-	WSC_18.		Yes
		WSC_19.		Yes
		WSC_2, 1		Yes
	-	WSC_20,		Yes
		WSC_21.		Yes
	-	WSC_22.		Yes

g. File > Save and Close Note



opo iConnect				Chuck S 1/31/202	3 2:22 PM
File Tools					
Notes Details					
Division *	APD 🗸				
Note By *	Basing Similar	~			
Note Date *	01/31/2023				
Program/Provider *	A Test Provider 🗙 Deta	ils			
Note Type *	Speciality Assessments/	Treatment Plans 🛛 🗸	• *		
Note Sub-Type		~			
Description	Title of Document Required 2022	d for Billing for example C	MS Invoice for May		
Note					
Status *	Complete V				
Date Completed	01/31/2023				
Attachments					
Add Attachment					
Document	Description	Description Category Actio			
Invoice2022MAY.docx	Briefs and Chux Invoice for Ma	ay 2022			Remove
Note Recipients					
Add Note Recipient:		Clea	r		
Name	Date Sent	Date Read	Status	Date Signed	