## 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 [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
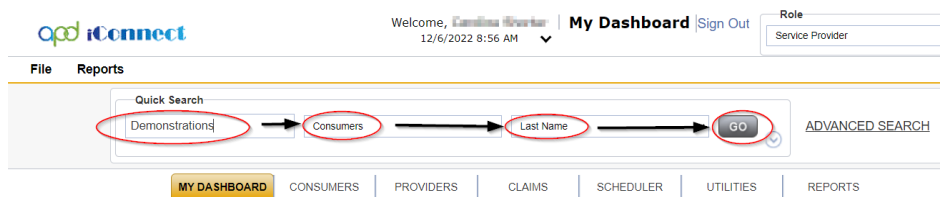
3. Click the **Note** tab > click **File > Add Note**
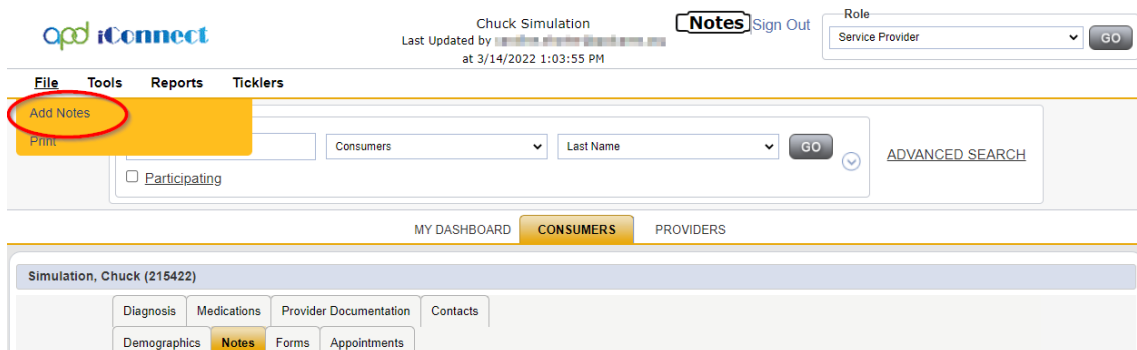
4. The Note Details page is displayed. Update the following fields:

    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. 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

    ii. **<u>Emergency Response Systems, Durable Medical Equipment (DME), Consumable Medical Supplies (CMS)</u>** 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 *	[redacted] ▾
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 *I* <u>U</u> 16px ▾ **A** ▾

    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. *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. MayInvoice.pdf*

                            b. *Ex. MayInvoice.docx*

                    ii. Description = Type in a description in the text box
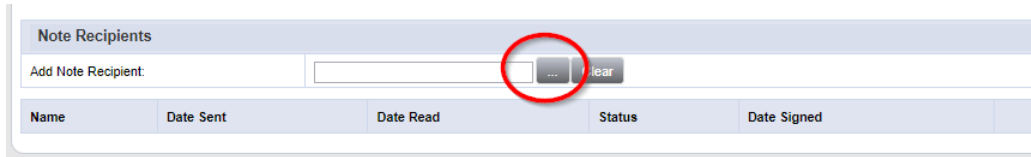
        iv. Click Upload

            1. The File will be listed as a Document.

*IMPORTANT: When attaching a file in iConnect, please **do not include <u>any 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.*
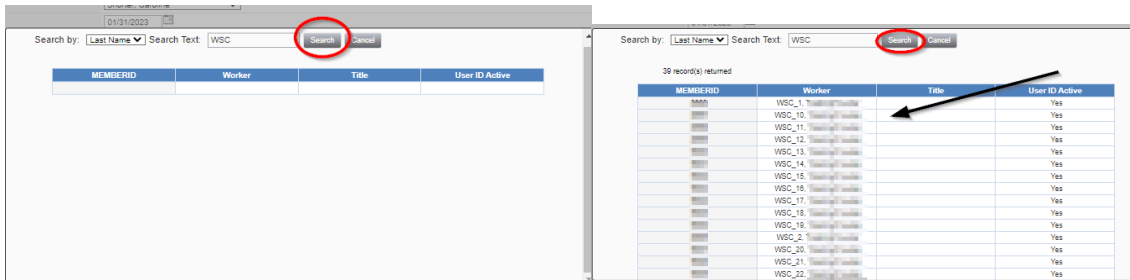
    f. Note Recipient = Waiver Support Coordinator

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.

g. File > Save and Close Note

apd iConnect

Chuck Simulation | **Notes**
1/31/2023 2:22 PM

File   Tools

Notes Details

Division *	APD ▾
Note By *	[redacted] ▾
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

Note

B *I* U 16px ▾ A ▾

Status *	Complete ▾
Date Completed	01/31/2023

Attachments

Add Attachment

Document	Description	Category	Action
Invoice2022MAY.docx	Briefs and Chux Invoice for May 2022		Remove

Note Recipients

Add Note Recipient: [   ] ... Clear

Name	Date Sent	Date Read	Status	Date Signed	
WscPlaceHolder, Suncoast	1/31/2023		Unread		Remove