

Differentiating Agency Vs. Facility Records from Provider Tab in iConnect

Introduction

This guide was created for stakeholders to understand the difference between Agency and Licensed Facility records to ensure that you are completing the required tasks in iConnect on the correct record.

Not understanding the difference between the two records may result in responding to PORs/NNCs or submitting Licensing Renewal Forms within the incorrect record in iConnect. PORs will be completed on the Agency record. NNCs and Licensing Renewals will be completed on the Licensed Facility record.

Differentiating Agency Vs. Facility Records

1. To begin, log into iConnect and set Role = <u>Service Provider</u>. Click Go.

Good iConnect	MHNE-Res Hab LLC Last Updated by worker_13147 at 4/3/2024 2134106 PM
	Quick Search
	MY DASHBOARD CONSUMERS PROVIDERS

- 2. Navigate to the applicable Provider record.
 - a. Type the name in the Quick Search text field (first field on the left) for either the Agency record (parent) or the Facility (Group Home) record as needed.
 - b. Ensure that the second field contains Providers, third field contains Provider Name and click "Go.

ſ	Quick Search						
	Providers	~		Provider Name	2	~	GO 🚫
L		1					
		MY DASHBOARD C	ONS	SUMERS	PROVIDERS		

<u>Tip</u>: From the search results, typically, the provider agency name is listed in all CAPS and the facility name in Title Case (not all CAPS).



Select the applicable record. The record will open on the Providers demographics tab. From the **Provider** Tab, side by side, the records look similar, but here are a few key details that will help you differentiate between the Agency and the Facility (Group Home) record in iConnect:

Differentiating Agency Vs. Facility Records

3. Navigating to Your Agency Record (or Parent/Corporate) record:

- Medicaid Provider ID # will be listed on the Agency Record:

	MY DASHBOARD CONS	SUMERS PROVIDERS
MHNE-Res Hab LLC (29005)		
	Workers Services Provider ID Numbers Beds Linked Providers Ser	rvice Area
	Providers CAP EVV Activities EVV Scheduling Forms Contracts	Enrollments Authorizations Notes Appointments Credentials
Basic Information		
Provider Name	MHNE-Res Hab LLC	Residential Monitor
DBA (if applicable)/Facility Name		Licensing Specialist
Licensed Home licensed for capacity		Area Behavior Analyst
Active	Yes	Licensed Home/ADT # of workers
External	Yes	Licensed Facility
Exclude from Selection	No	Medicaid Provider ID 999997999
QA Workstream Worker	Halle, Margaret	Provider EIN 777779777

- **No** Licensed Capacity # will be listed on the Agency Record:

					MY	DASHBOA	RD C	ONSI	UMERS	PROVIDERS				
MUNE Pos Hab LLC (20005)														
MINE-Nes hab LLC (25005)														
	Work	kers Servic	es Provider ID I	Numbers	Beds	Linked Pro	viders	Servi	ice Area					
	Prov	viders CAF	EVV Activities	EVV S	cheduling	Forms	Contract	ts	Enrollments	Authorizations	Notes	Appointments	Credentials	
Basic Information														
Provider Name	MHNE-Res Hab								Residential	Monitor				
DBA (if applicable)/Facility Name									Licensing S	pecialist				
Licensed Home licensed for capacity									Area Behav	ior Analyst				
Active	Yes								Licensed H workers	ome/ADT # of				
External	Yes								Licensed Fa	acility				
Exclude from Selection	No								Medicaid Pr	rovider ID	99	99997999		
QA Workstream Worker	Halle, Margaret								Provider El	N	7	77779777		

Updated May 20, 2024



- **No** Licensed Facility information will be listed on the Agency Record:

						M	DASHBOA		CONS	SUMERS	PROVIDERS			
MHNE-Res Hab LLC (29005)														
		Workers	Services	Provider ID N	umbers	Beds	Linked Pro	oviders	Ser	vice Area				
		Providers	CAP	EVV Activities	EVV S	cheduling	Forms	Contra	cts	Enrollments	Authorizations	Notes	Appointments	Credentials
Basic Information														
Provider Name	MHNE-Res	s Hab LLC								Residentia	I Monitor			
DBA (if applicable)/Facility Name										Licensing	Specialist			
Licensed Home licensed for capacity										Area Behav	vior Analyst			-
Active	Yes									Licensed H workers	lome/ADT # of			
External	Yes									Licensed F	acility			
Exclude from Selection	No									Medicaid P	rovider ID	99	9997999	
QA Workstream Worker	Halle, Mar	garet								Provider El	IN	77	7779777	

Additional information from various tabs on Agency Record:

Click on Workers tab -

- **All workers** listed on Workers tab (including those with Service Provider Worker role) on the Agency Record:

_							M	Y DASHBO	ARD	ONSUMERS	PROVIDERS				
7	MHNE	-Res Hab LLC (20005)													
		-403 Hub EEG (20000)													
			Workers	Service	s Provider ID	Numbers	Beds	Linked F	Providers	Service Area					
			Providers	CAP	EVV Activities	EVV Sc	heduling	Forms	Contracts	s Enrollments	Authorizations	Notes	Appointments	Credentials	1
	Filte	rs Name V + earch Reset roviders Workers record(s) returned - r	now viewing	1 through	n 15		L.	-	- 					- 	
		Worker N	lame 🛓								Title				
		Brown-Ferrier, Mollie		4											
		Dejoie, Beatrice													
		Farmer, Cynthia			H	lealing and	d Caring H	lands Heal	thcare						
		Halle, Margaret			i	Connect Tr	ainer - Se	nd for Reg	ion/SO revie	ew					



Click on Services tab –

- All Services will be listed in Services tab on the Agency Record:

MHNE-Res Hab LLC (2005) Workers Services Provider ID humbers Beds Linked Providers Service Area Providers CAP EVV Activities EVV Scheduling Forms Contracts Enrollments Authorizations Notes Appointments Credentials Filters Active Equal Tov @ Yes No AND v X Service Code +							MY	DASHBOAR		SUMERS	ROVIDER	5					
Workers Services Provider ID Numbers Beds Linked Providers Service Area Providers CAP EVV Activities EVV Scheduling Forms Contracts Enrollments Authorizations Notes Appointments Credentials Filters Adive Equal To Werks No AND Service Code + Search Reset 72 Providers Services record(s) returned - now viewing 1 through 15 Service Code Effective Division End Date Units Provider Additional Documentation 50:00 0000-WVR 0701/2022 APD Units Provider Additional Documentation 50:00 0000-WVR True (More than 5) Agency Geographic Non- Geographic Non- Ge	MHNE-Res Hab L	LC (29005)															
Providers CAP EVV Activities EVV Scheduling Forms Contracts Enrollments Authorizations Notes Appointments Credentials Filters Adive Equal Tov Yes No AND Reset -72 Providers Services record(s) returned - now viewing 1 through 15 Service Code Effective Division End Date Units Provider Additional Documentation 0000-WVR Oronov R Construction Solo 0000-WVR Contracts End Date Units Provider Additional Documentation Solo 0000-WVR True (More than 5) Agency Geographic Nonce, Geographic, Nonce, Ge				Workers	Service	Provider ID Num	bers Beds	Linked Pro	viders Se	rvice Area							
Filters Adtw Equal Tov West No ANDv X Service Code +				Providers	CAP	EVV Activities E	VV Scheduling	Forms	Contracts	Enroliments	Authorizatio	ns Notes	Appointments	Credentials			
Search Reset Reset 72 Providers Services record(s) returned - now viewing 1 through 15 Service Code Effective 0 Nvision End Date Unit Provider Additional Documentation So 00 Cost Secondary Consumer County Provider Ratic Geographic Differenti 0000-WVR 07/01/2022 APD Iofida 2022 Trip Transportation - Addit - Trip 50 00 2095-TR True (More than 5) Agency Moreo: Geographic Non-Ceographic	Filters Active Service Code	 Equal To + 	•	r'es 🔿 Ni	D A												
Service Code Determine Effective Determine Division End Date Type Unit Type Description Cost Secondary Code Comments Actve Consumer County Provider Rate Type Service Ratio Geographic Differenti Ceographic 0000-W/R 0701/2022 APD Units Provider Additional Documentation 50.00 0000-W/R True (More than 5) Agency Geographic Differenti Ceographic 0299-TR 1008/2021 APD 06/30/2022 Trip Transportation - Adult - Trip 50.00 0299-TR True (More than 5) Agency Moreopretor Geographic H0043.UC 1008/2021 APD 06/30/2022 Day (4/75) Residential Habilitation - Basic 54.18 H0043.UC True (More than 5) Agency Non-Geographic	-72 Providers Set	rvices record(s) returned -	now viewin	Sean	ch Reset											
0000-WVR 07/01/2022 APD Units Provider Additional Documentation S0 00 0000-WVR True (More than 5) Agency Geographic Morroe. Non-Geographic 0299-TR 10/08/2021 APD 06/30/2022 Trip Transportation - Adult - Trip S0 00 029-TR True (More than 5) Agency Geographic Morroe. Geographic Morroe. Geographic H0043 UC 10/08/2021 APD 06/30/2022 Day (4/176) Residentifal Habilitation - Basic \$41.88 H0043 UC True (More than 5) Agency Morroe-Geographic	Service Code	Effective Date	Division	End Date	Unit Type	Descri	ption	Cost	Second	lary e Comme	ts Active	Con	sumer County	Provid	der Rate vpe	Service Ratio	Geographic Differential
0299-TR 10/80/201 APD 06/30/202 Trip Transportation - Adult - Trip 50.00 0299-TR True (More than 5) Agency Morrise- Geographic, Non-Geographic H0043 UC 10/80/201 APD 06/30/2022 Dev (4176) Residential Habilitation - Basic \$41.88 H0043 UC True (More than 5) Agency Morrise-Geographic	0000-WVR	07/01/2022	APD		Units	Provider Additional D	ocumentation	\$0.00	0000-WVR		True	(More than 5	i)	Agency			Geographic, Monroe, Non- Geographic
H0043 UC 10/08/2021 APD 06/30/2022 Day (4176) Residential Habilitation - Basic S41.88 (H0043 UC True (More than 5) Agency Non-Geographic		10/08/2021	APD	06/30/2022	Trip	Transportation - Adul	t - Trip	\$0.00	0299-TR		True	(More than 5	i)	Agency			Monroe, Geographic, Non-
	0299-TR												·				Geographic

Click on Authorizations tab -

- All Authorizations will be listed in Authorizations tab on the Agency Record:

М	HNE	E-Res Hab LLC (29	005)																
				Workers	Services	Provider ID 1	Numbers	Beds	Linked Pr	oviders Se	rvice Area								
				Providers	CAP	EVV Activities	EVV Sch	eduling	Forms	Contracts	Enrollments	Authorizations	Notes	Appointments	Credentia	Is			
9	Filte	rs																	
Di	visio	n v	+																
-			Ċ																
		Search F	Reset																
	46 Providers Authorizations record(s) returned - now viewing 1 through 15																		
	3 Providers Authorizations record(s) returned - now viewing 1 through 15																		
Ŀ	•																		
		Division	Case No		Consum	ner	Auth I	D		Auth Start Da	te 🗸	with Er	nd Date	Au	th Status		La	st Updated	
	•	APD	209405	Korman,R	obin	:	258474		03/01/2024			00/30/2024		Approved		3/	21/2024 12:34:04 F	м	
		Service Code			Service			4	Auth Svc St	art Date	Auth Sv	c End Date	Max Unit	s Max A	mount	Aut	h Svc Status	Last Updated	
	ł	H0043:UC:HM	(4178) Residential H	labilitation -	Moderate	(day)		03/01/	2024		06/30/2024		122		619,062.50	Approve	d	3/21/2024 12:34:04 PI	м
	•	APD	209403	Mingo, Ter	ry	:	258209		12/01/2023			06/30/2024		Approved		11	1/7/2023 4:08:14 PM	1	
Service Code Service Auth Svc Start Date Max Units													Max Ame	ount	Auth Svc Statu	s Last Updated	1		
	Т	1001:UC:SC	4200) Residential Nur	sing - Asses	sment					12/01/2023		06/30/2024		2		\$14.56	Approved	11/7/2023 4:08:14	PM
	Т	1002:UC	4202) Residential Nur	sing - RN						12/01/2023		06/30/2024		852	\$6,	202.56	Approved	11/7/2023 4:08:14	PM

Click on CAP tab –

- CAP tab on the Agency Record is for responding to PORs:

MHNE-Pro	viders (28998)																		
			Workers	Services	Provider II	D Numbe	ers Con	tracts Beds	Linked F	Providers	Cor	ditions	Service Area	Admin	Actions	Facility Mana	igement		
			Providers	Divisions	EVV Act	tivities	Forms	Enroliments	Authorizat	ions N	lotes	Credentia	als EVV So	cheduling	CAP	Appointments	s		
Filters	filers																		
CAP ID	ners ₽ ID																		
	Se	arch Reset																	
-1 Provide	rs CAP record(s)	returned - now view	wing 1 throu	igh 1															
CAP ID	QIO Report Number	Date Provider Notified	CAP	Туре	Review Type	Status	CAP D Date	ue Nulla Ale	rts N	lumber of Items	d .	Licensing Worker	QAW W	orkstream /orker	Ov	Score	Compliance Score %	Person-Centered Practices Score %	Comments
21279		05/06/2024	Plan of Remediat	ion A	CR nnual	Pending	08/06/202	:4	1				Farmer, 0	Cynthia					

Remember: PORs will be completed on the Agency record in iConnect.



Differentiating Agency Vs. Facility Records

- 4. Navigating to Your Facility Record (Group Home) (Child) (Linked) will list:
- Licensed Capacity # will be listed on Facility (Group Home) record:

				MY DASH	HBOARD		NSUMERS	PROV	IDERS	REPOR	TS				
MHNE-Res Hab Facility (29004)														
	Workers Services Provider ID Numbers Contracts Beds Linked Providers Conditions Service Area Admin Actions Facility Management														
	Providers	Divisions	EVV Activities	Forms	Enrollr	ments	Authorizations	s Notes	Creder	ntials EVV	Scheduling	CAP	Appointments		
Basic Information															
Provider Name	MHNE-Res Hab Facili	y						Resident	tial Monito	r	Halle, N	argaret			
DBA (if applicable)/Facility Name								Licensin	g Speciali	st	Halle, N	argaret			
Licensed Home licensed for capacity	20							Area Bel	navior Ana	lyst					
Active	Yes							Licensed workers	Home/Al)T # of					
WSC QO								Licensed	I Facility						
External	Yes							Medicaid	l Provider	ID					
Exclude from Selection	No							Provider	EIN						
Specialist/Liaison															

- Licensing & Monitoring Staff names will be listed on Facility (Group Home) record:

					MY DAS	HBOARE		NSUMERS	PRO	VIDERS	R	EPORTS			
MHNE-Res Hab Facility (29004))														
		Workers	Services	Provider ID Numb	ers Co	ontracts	Beds	Linked Provid	lers	Conditions	Servi	ce Area	Admin A	ctions	Facility Management
		Providers	Divisions	EVV Activities	Forms	Enroll	ments	Authorizations	Not	es Crede	entials	EVV Sc	heduling	CAP	Appointments
Basic Information								_							
Provider Name	MHNE-Res	s Hab Facility	/						Reside	ential Monit	ог		Halle, Ma	argaret	
DBA (if applicable)/Facility Name									Licens	ing Special	ist		Halle, Ma	rgaret	
Licensed Home licensed for capacity	20								Area E	Behavior An	alyst				
Active	Yes								Licens	ed Home/A	DT # of				
WSC QO									Licens	ed Facility					
External	Yes								Medica	aid Provide	r ID				
Exclude from Selection	No								Provid	ler EIN					
Specialist/Liaison															



-

No Medicaid ID # will be listed on Facility (Group Home) record:

					MY DASI	HBOARD		NSUMERS	PROV	/IDERS	REPORT	S		
MHNE-Res Hab Facility (29004))													
	ſ	Workers	Services	Provider ID Numb	ers Co	ntracts	Beds	Linked Provid	ders C	onditions	Service Area	Admin	Actions	Facility Management
		Providers	Divisions	EVV Activities	Forms	Enroll	ments	Authorizations	Notes	Crede	ntials EVV S	cheduling	CAP	Appointments
Basic Information														
Provider Name	MHNE-Res	Hab Facility							Residen	tial Monito	ог	Halle, M	argaret	
DBA (if applicable)/Facility Name									Licensir	ng Special	st	Halle, M	argaret	
Licensed Home licensed for capacity	20								Area Be	havior Ana	alyst			
Active	Yes								License workers	d Home/A	DT # of			
WSC QO									License	d Facility				
External	Yes								Medicai	d Provider	ID			
Exclude from Selection	No								Provide	r EIN				
Specialist/Liaison														

Additional information from various tabs on Facility (Group Home) Record:

Click on the Workers tab -

- **Only workers with Service Provider role** listed in Workers tab on Facility (Group Home) record:

File														
MHNE-Res Hab Facility (29004)														
, ,			Y											
	Workers Services Pro					Providers S								
	Providers CAP EVV A					Contracts	Enrollments	Authorizations	Notes	Appointments	Credentials			
-Filters Norker Name V + Search Reset -34 Providers Workers record(s) returned - now viewing 1 through 15														
Search Reset	eturned - now viewing	1 throug	h 15											
Search Reset	eturned - now viewing prker Name 🔺	1 throug	h 15				Titl	9						
Search Reset 	eturned - now viewing orker Name 🔺	1 through	h 15				Titl	9						
Search Reset 	eturned - now viewing orker Name 🔺	1 throug	h 15 Healing	g and Caring Har	ds Healthcare		Titl	3						
Search Reset 	eturned - now viewing orker Name 🔺	1 through	h 15 Healing iConne	g and Caring Han	ds Healthcare	e D review	Titl	3						
Search Reset 	sturned - now viewing	1 through	h 15 Healing iConne	g and Caring Han	ds Healthcare for Region/S(s D review	Titl	3						
Search Reset 34 Providers Workers record(s) re Wo Buffington, Christine Farmer, Cynthia Halle, Margaret Worker_19095, Training Worker_19120, Training	sturned - now viewing	1 through	h 15 Healing iConne	g and Caring Har sct Trainer - Send	ds Healthcare for Region/S(e D review	Titl	9						



Click on the **Services tab:**

- No services will be listed in Services tab on Facility (Group Home) record:

WHNE-Res Hab Facil	ity (29004)			1		Υ	, in T					
		Workers	Services	Provider ID I	Numbers Beds	Linked F	Providers	Service Area				
		Providers	CAP	EVV Activities	EVV Scheduling	Forms	Contracts	Enrollments	Authorizations	Notes	Appointments	Credentials
Active Service Code	Equal To	● Yes ○ No	AN	Dv x								
	_											

Click on Authorizations tab:

- **No authorizations** will be listed in Authorizations tab on Facility (Group Home) record:

MHNE-Res Hab Facility (29004)										
	Workers	Workers Services		Provider ID Numbers Beds			roviders	Service Area		
	Providers	CAP	EVV Activities	EVV Sc	heduling	Forms	Contrac	ts Enrollmen	ts Authorizations	Notes
Filters										
Division 🗸 +										
Search Reset										
0 record(s) returned										

Click on the CAP tab:

- CAP tab on Facility (Group Home) record is for responding to NNCs:

			Workers	Services	Provider ID Numbers		Beds Linked		Providers Service		Area				
			Providers	САР	EVV Activities	EVV	Scheduling	Forms	Contra	cts Enr	oliments	Authorizations	Notes	Appointments	Credentials
Filters															
CAP ID		♥ +													
		Search Reset													
-14 Provi	-14 Providers CAP record(s) returned - now viewing 1 through 14														
CAP ID	QIO Report Number	Date Provider Notified	CAP Ty	pe ^I	Review Type Star	tus	CAP Due Date	Number	of N	umber of Items	Licens Work	ing QA Worl	kstream ker	Overall PDR Score	Compliance Score %
20586		07/31/2023	ROM Letter		Comp	olete 08	8/18/2023		2		Guiry, Catherine	,			
20644		11/13/2023	Notice of Nor Compliance	1-	Comp	olete 11	1/28/2023		3		Halle, Margaret				

<u>Remember: NNCs and Licensing Renewals will be completed on the Facility</u> <u>record in iConnect.</u>

More information on iConnect is also available on the <u>iConnect eLearning Library</u>. Please reach out to your Regional Trainer for assistance if you have questions.