

Differentiating Agency Vs. Facility Records from Provider Tab in iConnect

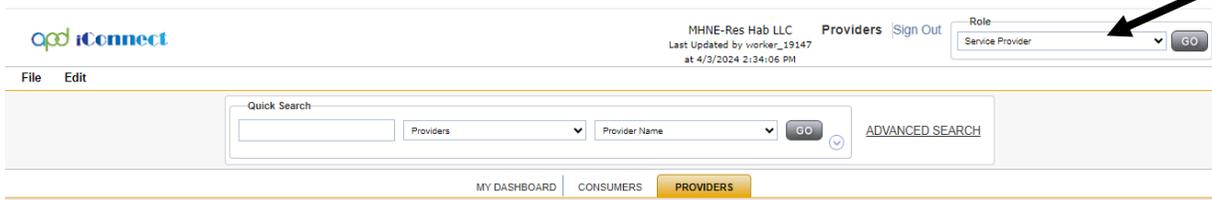
Introduction

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.

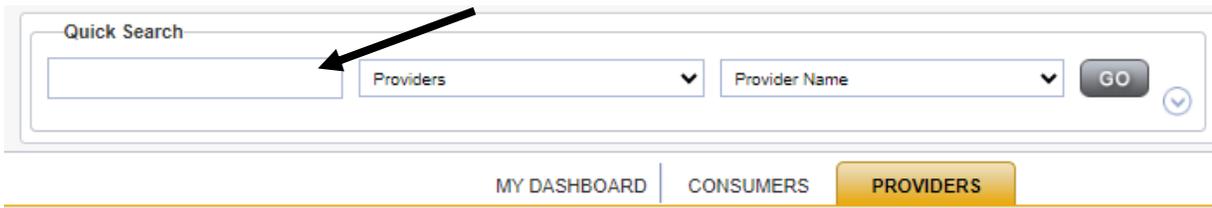
Differentiating Agency Vs. Facility Records

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



The screenshot shows the iConnect user interface. At the top right, the user is logged in as 'MHNE-Res Hab LLC' with the role 'Service Provider' selected in a dropdown menu. A black arrow points to the 'Service Provider' option in the dropdown. Below the login area, there is a navigation bar with 'MY DASHBOARD', 'CONSUMERS', and 'PROVIDERS' tabs. The 'PROVIDERS' tab is highlighted. In the center, there is a 'Quick Search' section with a text input field, a dropdown menu set to 'Providers', another dropdown menu set to 'Provider Name', and a 'GO' button. An 'ADVANCED SEARCH' link is also visible.

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".



The screenshot shows the 'Quick Search' section of the iConnect user interface. A black arrow points to the text input field on the left. The dropdown menu next to it is set to 'Providers'. The second dropdown menu is set to 'Provider Name'. A 'GO' button is located to the right of the dropdown menus. Below the search section, the navigation bar shows 'MY DASHBOARD', 'CONSUMERS', and 'PROVIDERS' tabs, with 'PROVIDERS' highlighted.

Tip: 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 CONSUMERS PROVIDERS			
MHNE-Res Hab LLC (29005)			
<div style="display: flex; justify-content: space-between; font-size: small;"> Workers Services Provider ID Numbers Beds Linked Providers Service Area </div> <div style="display: flex; justify-content: space-between; font-size: small; margin-top: 5px;"> Providers CAP EVV Activities EVV Scheduling Forms Contracts Enrollments Authorizations Notes Appointments Credentials </div>			
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 DASHBOARD CONSUMERS PROVIDERS			
MHNE-Res Hab LLC (29005)			
<div style="display: flex; justify-content: space-between; font-size: small;"> Workers Services Provider ID Numbers Beds Linked Providers Service Area </div> <div style="display: flex; justify-content: space-between; font-size: small; margin-top: 5px;"> Providers CAP EVV Activities EVV Scheduling Forms Contracts Enrollments Authorizations Notes Appointments Credentials </div>			
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 Facility information will be listed on the Agency Record:

MY DASHBOARD | CONSUMERS | **PROVIDERS**

MHNE-Res Hab LLC (29005)

Workers Services Provider ID Numbers Beds Linked Providers Service 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

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:

MY DASHBOARD | CONSUMERS | **PROVIDERS**

MHNE-Res Hab LLC (29005)

Workers Services Provider ID Numbers Beds Linked Providers Service Area

Providers CAP EVV Activities EVV Scheduling Forms Contracts Enrollments Authorizations Notes Appointments Credentials

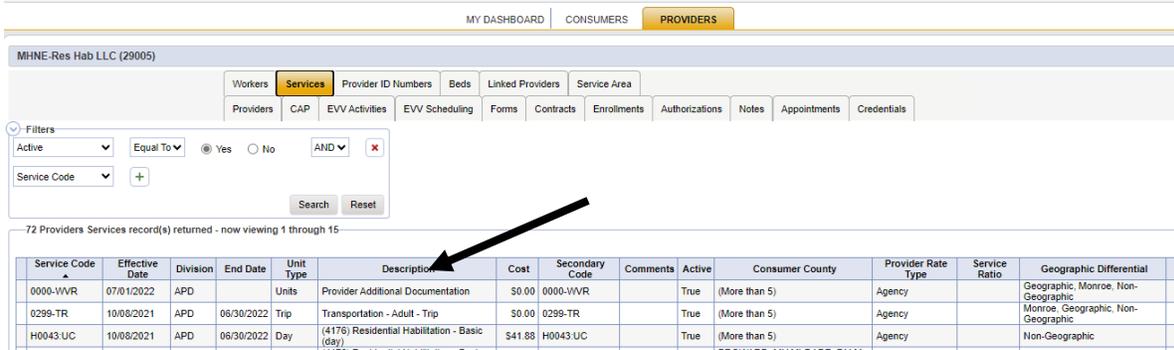
Filters
 Worker Name +
 Search Reset

42 Providers Workers record(s) returned - now viewing 1 through 15

Worker Name	Title
Brown-Ferrier, Mollie	
Dejoie, Beatrice	
Farmer, Cynthia	Healing and Caring Hands Healthcare
Halle, Margaret	iConnect Trainer - Send for Region/SO review

Click on **Services tab** –

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

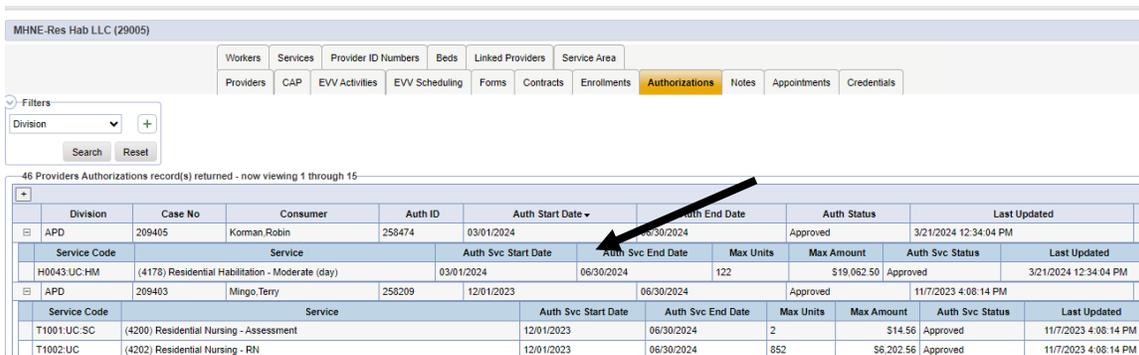


72 Providers Services record(s) returned - now viewing 1 through 15

Service Code	Effective Date	Division	End Date	Unit Type	Description	Cost	Secondary Code	Comments	Active	Consumer County	Provider Rate Type	Service Ratio	Geographic Differential
0000-WVR	07/01/2022	APD		Units	Provider Additional Documentation	\$0.00	0000-WVR		True	(More than 5)	Agency		Geographic, Monroe, Non-Geographic
0299-TR	10/08/2021	APD	06/30/2022	Trip	Transportation - Adult - Trip	\$0.00	0299-TR		True	(More than 5)	Agency		Monroe, Geographic, Non-Geographic
H0043-UC	10/08/2021	APD	06/30/2022	Day	(4176) Residential Habilitation - Basic (day)	\$41.88	H0043-UC		True	(More than 5)	Agency		Non-Geographic

Click on **Authorizations tab** –

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

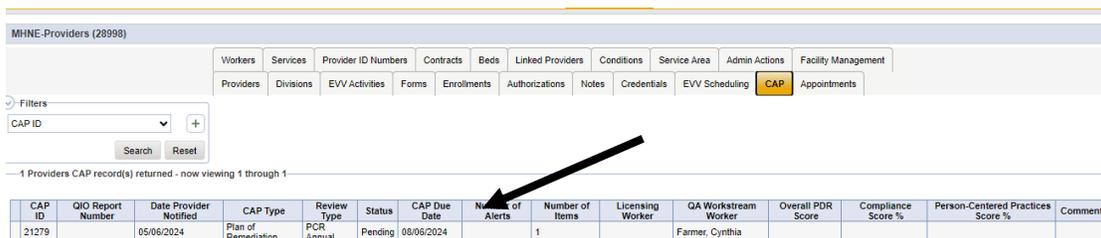


46 Providers Authorizations record(s) returned - now viewing 1 through 15

Division	Case No	Consumer	Auth ID	Auth Start Date	Auth End Date	Auth Status	Last Updated
APD	209405	Korman,Robin	258474	03/01/2024	06/30/2024	Approved	3/21/2024 12:34:04 PM
H0043-UC-HM	(4176) Residential Habilitation - Moderate (day)			03/01/2024	06/30/2024	Approved	3/21/2024 12:34:04 PM
APD	209403	Mingo,Terry	258209	12/01/2023	06/30/2024	Approved	11/7/2023 4:08:14 PM
T1001-UC-SC	(4200) Residential Nursing - Assessment			12/01/2023	06/30/2024	Approved	11/7/2023 4:08:14 PM
T1002-UC	(4202) Residential Nursing - RN			12/01/2023	06/30/2024	Approved	11/7/2023 4:08:14 PM

Click on **CAP tab** –

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



1 Providers CAP record(s) returned - now viewing 1 through 1

CAP ID	QIO Report Number	Date Provider Notified	CAP Type	Review Type	Status	CAP Due Date	Number of Alerts	Number of Items	Licensing Worker	QA Workstream Worker	Overall PDR Score	Compliance Score %	Person-Centered Practices Score %	Comments
21279		05/06/2024	Plan of Remediation	PCR Annual	Pending	08/08/2024	1	1		Farmer, 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 DASHBOARD CONSUMERS PROVIDERS REPORTS			
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	Enrollments
Authorizations		Notes	Credentials
EVV Scheduling		CAP	Appointments
Basic Information			
Provider Name	MHNE-Res Hab Facility	Residential Monitor	Halle, Margaret
DBA (if applicable)/Facility Name		Licensing Specialist	Halle, Margaret
Licensed Home licensed for capacity	20	Area Behavior Analyst	
Active	Yes	Licensed Home/ADT # of workers	
WSC QO		Licensed Facility	
External	Yes	Medicaid Provider ID	
Exclude from Selection	No	Provider EIN	
Specialist/Liaison			

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

MY DASHBOARD CONSUMERS PROVIDERS REPORTS			
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	Enrollments
Authorizations		Notes	Credentials
EVV Scheduling		CAP	Appointments
Basic Information			
Provider Name	MHNE-Res Hab Facility	Residential Monitor	Halle, Margaret
DBA (if applicable)/Facility Name		Licensing Specialist	Halle, Margaret
Licensed Home licensed for capacity	20	Area Behavior Analyst	
Active	Yes	Licensed Home/ADT # of workers	
WSC QO		Licensed Facility	
External	Yes	Medicaid Provider ID	
Exclude from Selection	No	Provider EIN	
Specialist/Liaison			

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

MY DASHBOARD CONSUMERS PROVIDERS REPORTS			
MHNE-Res Hab Facility (29004)			
<div style="display: flex; justify-content: space-between;"> Workers Services Provider ID Numbers Contracts Beds Linked Providers Conditions Service Area Admin Actions Facility Management </div> <div style="display: flex; justify-content: space-between;"> Providers Divisions EVV Activities Forms Enrollments Authorizations Notes Credentials EVV Scheduling CAP Appointments </div>			
Basic Information			
Provider Name	MHNE-Res Hab Facility	Residential Monitor	Halle, Margaret
DBA (if applicable)/Facility Name		Licensing Specialist	Halle, Margaret
Licensed Home licensed for capacity	20	Area Behavior Analyst	
Active	Yes	Licensed Home/ADT # of workers	
WSC QO		Licensed Facility	
External	Yes	Medicaid Provider ID	
Exclude from Selection	No	Provider EIN	
Specialist/Liaison			

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

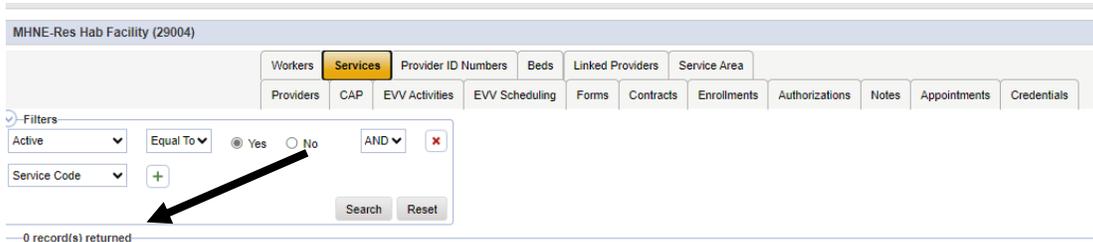
Click on the **Workers** tab –

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

File	
MHNE-Res Hab Facility (29004)	
<div style="display: flex; justify-content: space-between;"> Workers Services Provider ID Numbers Beds Linked Providers Service Area </div> <div style="display: flex; justify-content: space-between;"> Providers CAP EVV Activities EVV Scheduling Forms Contracts Enrollments Authorizations Notes Appointments Credentials </div>	
Filters Worker Name <input type="text"/> + <input type="button" value="Search"/> <input type="button" value="Reset"/>	
-34 Providers Workers record(s) returned - now viewing 1 through 15	
Worker Name	Title
Buffington, Christine	
Farmer, Cynthia	Healing and Caring Hands Healthcare
Halle, Margaret	iConnect Trainer - Send for Region/SO review
Worker_19095, Training	
Worker_19120, Training	
Worker_19121, Training	

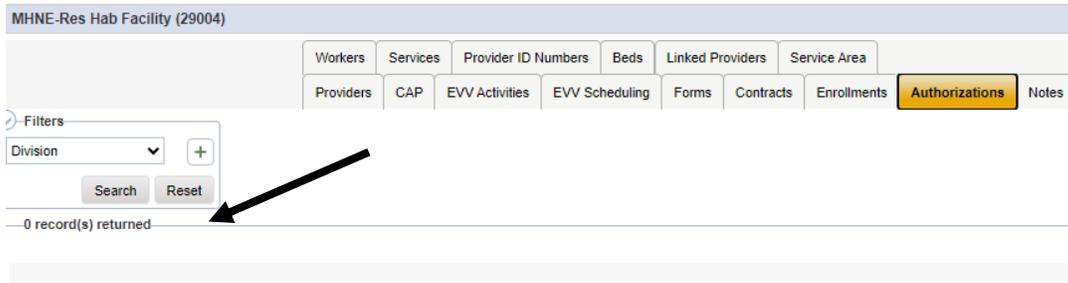
Click on the **Services** tab:

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



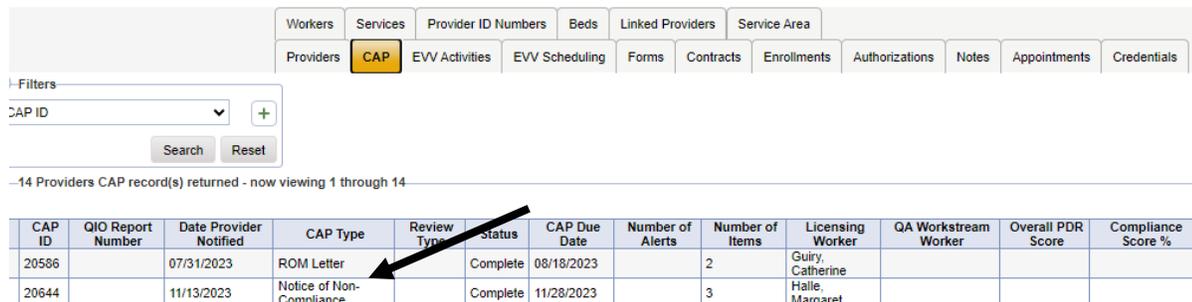
Click on **Authorizations** tab:

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



Click on the **CAP** tab:

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



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

More information on iConnect is also available on the [iConnect eLearning Library](#). Please reach out to your Regional Trainer for assistance if you have questions.