

# Documenting Services using the Provider Documentation tab of the Consumer's Record.

#### Introduction

Upon a Consumer receiving services, Providers are required to track and maintain those services and the details surrounding them. These details can include a variation of record keeping methods based on the type of service(s) rendered. The documentation types include Progress Notes, Attendance Logs, Service Logs, Trip Logs, or a combination of documents.

This job aid will encompass using iConnect to record services using the Provider Documentation Tab of the Consumer's record. If services are required to use the EVV system, this aid will not address those tasks, please refer to the EVV Information and Training Material website.

**How to use this job aid**: to understand how to fill out the Provider Documentation Screen, use the "Intro to completing Provider Documentation Screens with detailed images" section. This provides detailed instructions on how to complete the required fields of the Provider Documentation screen. Once familiarized with how the Provider Documentation record can be completed, use the Documentation specific sections as a quick reference to complete the required documentation (Service Log, Monthly Summary, Annual Report, etc).

Please refer to the <u>Developmental Disabilities Individual Budgeting Waiver</u> <u>Services Coverage and Limitations Handbook</u> for specific documentation requirements. Services provided after the implementation of iConnect must be added to iConnect prior to billing. Once a service is live in iConnect, the contracted vendor monitoring handbook compliance will look for documentation in iConnect.

#### Intro to completing Provider Documentation Screens with detailed images

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

οp	d iConnect	Welcome, 11/30/2022	1:02 PM 🗸	Sign Out	Role Service Provider	~	30
File	Reports						1
	Quick Search	Consumers	✓ Last Name	v		ADVANCED SEARCH	Ι
	Participating				$\bigcirc$	ADVANCED SEARCH	I
		M	Y DASHBOARL CONSUMERS PROVIDERS				

2. Navigate to the Consumer's record.



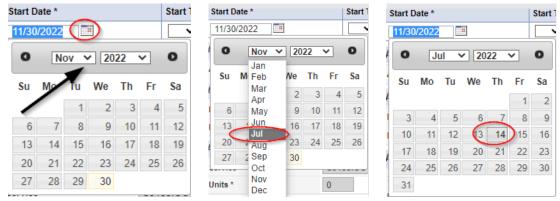
- a. Type the consumer's last name in the Quick Search text field (first field on the left)
- b. Ensure that the second field contains Consumers, third field contains last name and click "Go

op	d iConnect	Welcome, Carlie My Dashboard Sign Out	Role Service Provider
File	Reports		
	Quick Search Demonstrations Consumers	Last Name GO	ADVANCED SEARCH
	MY DASHBOARD CONSUMERS	PROVIDERS CLAIMS SCHEDULER UTILITIES	REPORTS

3. Click the **Provider Documentation** tab > click **File** > **Add Provider Documentation.** 

or	0 <b>0i (C</b> o	nnect	Lyre Demonstrations Provider Sign Out Last Updated by at 11/30/2022 11:45:34 AM	e Provider 🗸 GO
File	Tools	Ticklers		
Add Prov Print	vider Docun	nentation		
		Quick Search	Consumers V Last Name V CO	ADVANCED SEARCH
			MY DASHBOARD CONSUMERS PROVIDERS	
Demon	strations, I	Lyre (215662)		
		Diagnosis Medications Demographics Notes	Provider Documentation Contacts Forms Appointments	

- 4. The Provider Documentation Details page is displayed. Update the following fields:
  - a. Start Date: Use the Calendar icon to select the date. The date will not change until the date is selected in the calendar menu.



b. Start Time: Use the Dropdown Menus to make the selections. Select the Hour, the Minute, and AM/PM.



Start Time

01

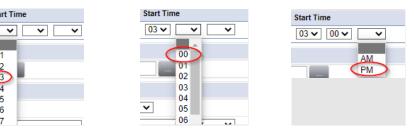
02

03

04

05

**•**06 07 Document Services using the Provider Documentation tab



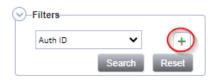
- c. End Date: End date may automatically populate to the same date, but if not make selection using the Calendar icon.
- d. End Time: Make selections from dropdown menus.
- Add e. Click Add.
  - i. Notice a new line that appears for dates and times, do not add a second date unless instructed otherwise.

1	Activity Times								
	Start Date *	Start Time	End Date *	End Time	Total Minutes				
	07/14/2022	03 V 00 V PM V	07/14/2022			Add			

5. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations. There are specific circumstances in which you may skip this step, but that will be listed in the documentation specific instructions.

Authorization	
Auth ID	

- a. Using the Filter Options can assist with locating the necessary Auth ID.
- b. Use the Green + to add filters.



c. Make the appropriate selections from the dropdown menus.

Start Date	Greater Than 🗸	07/01/2022	AND 🗸 🗶
Auth ID	3 +		
Auth Date	Ū		
Start Date			Search Reset
End Date			
Auth Service ID			
Service			

d. Use the Red X to remove filters.

Start Date	~	Equal To	~	07/01/2022	AND 🗸
Service	~	Equal To	~		AND V X
Auth ID	~	+			<u> </u>



- e. Click the Search button.
- 6. Click the Authorization. The Authorization ID is populated on the Provider Documentation details page.

Start Date		~	Equal T	• •	07/0	01/2022		A	ND 🗸	×			
Auth ID		~	+										
									<b>1</b> 11				
								Sear	ch _	Reset			
Auth Sear	ch reco	ord(s) ret	turned - n	ow viewin	ig 1 thro	ough 1		Sear	ch	Reset			
Auth Sear	ch reco	ord(s) ret	turned - n	ow viewin	ig 1 thro	ough 1		Searc	ch	Reset			
				ow viewin	ig 1 thro			Sear					
1			turned - n h Date	ow viewin	ng 1 thro	ough 1 Provide	ŧ٢	Sear		Reset Start Dat	te	End Date	

7. Verify that the Division and Provider information have been populated. If they are not, use the dropdown menus to make the appropriate selections.

Activity Details	
Division	APD 🗸
Provider	Simulation Provide V Details

8. Click the box next to the Service field that contains an ellipsis (three dots) to display a list of services for this authorization.

Activity Services		-		
Service *			Clear	Total
Units *		~		

a. Select the Service.

Dial	ogVer	ndorSer	viceSelec	tPopUp											×
		h By: Servic	e Type V	Search Text:	1	1	<b>v</b>	Searc			16	AuthServiceID		11	-
				(4080) Life Skills Development		15		EndDate							
$\leq$	5825	\$5135:UC	\$5135:UC	- Level 1 (Community Inclusion)	3.13	mins	11/29/2021		07/01/2022	06/30/2023	251237	156906	400	0.00 400.00	

- b. The Activity Services details are populated on the Provider Documentation details page.
- Verify/update the number of Units as needed. Some services are programmed to populate this field, whereas other services are not programmed to populate this field.
  - a. In the first example, the units cannot be changed. In the second example, Units were updated. Notice the difference in the shade of the boxes, editable fields have a white background.



Document Services using the Provider Documentation tab

Activity Services		
Service *	05735 ID (JUBI) Life Bills Development - Level Clear Total Cost	\$37.56
Units *	12	
Rate	\$3.13	
Secondary Code	\$5135:UC	N.
Activity Services		
Service *	1000-1109 Presider Additional Decementation Clear Total Cost	\$0.00
Units *		
Rate	\$0.00	
Secondary Code	8000 //WW	
Unit Type	Units	

- 10. Provider Documentation Type = Select as needed.
  - a. Use the scrollbar to see all the selections.

Do	cumentation			
Do	ovider cumentation be *	Annual Report Daily Attendance Log Monthly R&B Monthly Summary Progress Note Quarterly Summary Trip Log		*

- b. The carat pointing to the right will move selections to the box on the right.
  - i. Single carat moves the selected options.
  - ii. Double carats move all the items.

Documentation		
Provider Documentation Type *	Annual Report Daily Attendance Log Monthly R&B Monthly Summary Progress Note Quarterly Summary Trin Log	

c. Ctrl + Mouse Clicks can be used to make multiple selections at one time (example below).

•	,	
Documentation		
	Annual Report	*
Provider	Monthly R&B	
Documentation Type *	Monthly Summary Progress Note	
	Quarterly Summary	
	Trip Log	v

d. Selections should be moved to the box on the right.

Documentation		
Provider Documentation Type *	Daily Attendance Log Monthly R&B Monthly Summary Trip Log Service Log	Annual Report Progress Note Quarterly Summary
		- <b>1</b>



- e. If incorrect selections were made, use the carat pointing to the left to move those selections back into the original menu on the left.
  - i. Single carat moves the selected options.
  - ii. Double carats move all the items.

Documentation	
Provider Documentation Type *	Daily Attendance Log Monthly R&B Monthly Summary Trip Log Service Log

11.Note - Enter details of the services provided to the consumer by typing in the text box.

<b>B Z</b> <u>U</u> 10pt <b>→ A →</b>	
The following is an example and may not meet your specific handbook	
requirements. I picked Lyre up from his home at 3Pm and the second state and the second state and the second state at the seco	100
wanted to see the new Wonder Woman movie that just came out and attenuard chose to	
aut divisor out. Lyne wanted part that no we want to Part hakapta yant that is his tayonte.	
Live ordered the card that how the wateries and he saked to it to be used water. He also	
entered a role to drive the up registed for pur manin up takent about here on fail about the	
new Wonder Wonan movie. Lyte internet ne that he didn't the the tail guy. He was	
also benefati that the main shares and in the set based a local internet. Also a set of the	
provide the set of the	•
49212 characters remaining	

12. Status - Can be updated by using the dropdown menu. This should be changed to Complete once the activity is finalized and prior to billing.

	Worker*	Shorte, Caroline
	Status	Pending ~
ar	Total Cost	Pending Complete \$37.56

13. File > Save and Close Provider Documentation.

 7/14/2022	00 V PM V	I Check
		Provider Documentation
 		e and Close Provider Documentation
		e Provider Documentation



# Daily Attendance Log

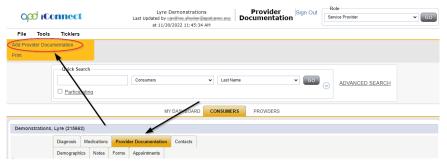
Service Providers will document activities for the following services on the Provider Documentation tab in iConnect:

- Life Skills Development 3 (Adult Day Training)
- Life Skills Development 4 (Prevocational Services)
- Residential Habilitation Services

Please refer to the Intro to completing Provider Documentation Screens with detailed images for instructions on how to complete each field.

**Notice** that Attendance Logs are unique in that one provider documentation activity will contain multiple dates, depending on the type of service provided.

- Daily Attendance Logs for ResHab Services will contain all dates of service for the month.
  - ResHab Services must be 24+ days to use the monthly rate. If the Service provides less than 24 days, the service must use the daily rate.
- Daily Attendance Logs for LSD3 and LSD4 Services will contain all dates of service for the week.
- To begin, log into iConnect and set Role = <u>Service Provider</u> or <u>Service Provider</u> <u>Worker</u>. Click Go.
- 2. Navigate to the Consumers record and click the **Provider Documentation** tab > click **File > Add Provider Documentation.**



- 3. The Provider Documentation Details page is displayed. Update the following fields:
  - a. Start Date: Select the Date of Service.
  - b. Start Time: Select the start time of the service
  - c. End Date: Select the Date of Service.
  - d. End Time: Select the end time of the service
  - e. Click Add.



**IMPORTANT:** Repeat this step to add all the days in which this individual received services for

- the week when documenting daily attendance for LSD3 and LSD4
- *the month* when documenting daily attendance for Residential Habilitation Services
  - Additionally, when Residential Habilitation services are approved (with either the monthly or the daily rate) the start date can be the beginning of the month and the end date can be the last day of the month (ie: intervals).
    - For example: 01/01/2024 12:00AM - 01/31/2024,11:59PM
  - If an individual is not at the home during specific dates within the month, then there will be multiple intervals.
    - For example, when an individual resides in the licensed facility on weekdays, then intervals can include 01/01/2024 12:00AM 01/05/2024,11:59PM 01/08/2024 12:00AM 01/12/2024 11:59PM 01/15/2024 12:00AM 01/19/2024 11:59PM 01/22/2024 12:00AM 01/26/2024 11:59PM 01/22/2024 12:00AM 01/26/2024 11:59PM 01/29/2024 12:00AM 01/31/2024 11:59PM
- 4. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations.

**IMPORTANT:** Ensure the appropriate Authorization ID is chosen for the appropriate timeframe of service provided. If there is a need to obtain a new auth id with the day rate, Providers must contact the WSCs and withhold documenting the service until the WSC makes the change in the consumer's cost plan and issues a corrected Authorization.

- 5. Click the Authorization.
  - a. The Authorization ID will populate on the Provider Documentation details page.
- 6. 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.
  - a. The Activity Services details are populated on the Provider Documentation details page.



- 7. Verify the number of Units is populated. If needed, populate this with the quantity of units being documented (ex. Monthly ResHab services require manual entry). Note the Total Cost value changes as the number of Units change.
- 8. Provider Documentation Type = Select Daily Attendance Log.
  - a. If additional selections are needed, make those additional selections too.
- 9. Note = Enter details of the services provided to the consumer and ensure to document when the individual is not in the home and receiving other services.
  - a. For example: At ADT from approximately 8:00am- 3:00pm every weekday during January except for Monday 1/15/2024 where the ADT was closed for the holiday.
- 10. Status = Complete.

opd iCon	nect				Lyre Demonstrations 11/30/2022 1:47 PM	Provider Documentation
File						
Start Date *	Start Time	End Date *	End Time		Total Minutes	
07/14/2022	03 V 00 V PM V	07/14/2022	06 🗸	00 🗸 PM 🗸	180	Delete
30/2022		11/30/2022		<b>~ ~</b>		Add
Authorization			-			
Auth ID	257185		PA Num	ber		
Activity Details	*					
Division	APD 🗸		Worker		Distant Carolina	Clear Details
Provider	Simulation Provider V		Status		Complete 🗸	
Activity Services						
Service *	S5135:UC (4080) Life Skil	Is Development - Level	Clear Total Co	ost	\$37.56	
Units *	12					
Rate	\$3.13					
Secondary Code	S5135:UC					
Unit Type	15 mins					
Documentation						
				<b>В</b> <u>Z</u> <u>Ш</u> 16рх -	A •	
Provider Documentation Type *	Annual Report Daily Attendance Log Wonthly R&B Wonthly Summary Progress Note Duarterly Summary	No v	te *	movies. Lyre wanted afterward chose to ea that is his favorite. Ly very spicy. He also o how we felt about the bad guy. He was also	ample. I picked Lyre up from his hou to see the new Wonder Woman data at dimer out. Lyre wanted pad thai, s yre ordered the pad thai from the wait dredred a cola to drink. As we waited new Wonder Woman movie. Lyre in hoping that the main character woul ed, we ale at the restaurant. There v no how	ie that just came out and o we went to PadThaRestaurant ress and he asked to it to be for our meals we talked about formed me that he didn't like the id have found a love interest.
				coose allocations and allocation		

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



# Monthly Summary

A monthly summary is a written summary of the activities that took place during each month, including the consumer's progress toward achieving goals. Add the Monthly Summary as a separate activity using the 0000-WVR Code.

Please refer to <u>the Intro to completing Provider Documentation Screens with</u> <u>detailed images for instructions</u> on how to complete each field.

For ResHab Providers: Monthly summaries may be submitted if the provider choses to do a monthly summary each month rather than a quarterly summary

Add the Monthly Summary as a separate activity using the 0000-WVR Code:

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

opd iConnect	Welcome, Contraction My Dashboard Sign Out	Role Service Provider
File Reports		1
-Oulek Search		

2. Navigate to the Consumer's record and click the **Provider Documentation** tab > click **File > Add Provider Documentation.** 

op	<mark>d iC</mark> o	nnect		Last Updated by	emonstrations 2022 11:45:34 AM		Provider Documentation	Sign Out	Role Service Provider	▼ GO
File	Tools	Ticklers								
Add Provi Print	ider Docun	nentation								
		Quick Sea		Consumers	~	Last Name		• G0	O ADVANCED SEARCH	
			$\mathbf{i}$	MY	DASHBOARD CO	NSUMERS	PROVIDERS			
Demons	strations, I	Lyre (215662								
		Diagnosis	Medications	Provider Documentation	Contacts					

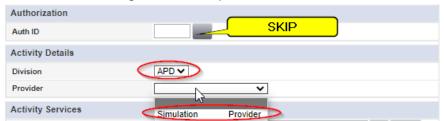
- 3. The Provider Documentation Details page is displayed. Update the following fields:
  - a. Start Date: Select the Date of Service.
  - b. Start Time: Select the start time of the service
  - c. End Date: Select the Date of Service.
  - d. End Time: Select the end time of the service
  - e. Click Add.

## 4. SKIP the AUTH ID Section

- 5. Since the Auth usually populates the following fields, make sure to complete the following additional sections (select from dropdown menu).
  - a. Division = APD



b. Provider = The organization represented



6. 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 0000-WVR Service.

logVen	dorServi	ceSelectPo	pUp								
Search By: Secondary Code V Search Text: Search Cancel											
ServiceID ServiceCode SecondaryCode Service UnitCost UnitType EffectiveDate EndDate VServiceID MaxAuth Used Remaining											
5975			0.00	Units	07/01/2021		251236	0	0	0	

If the 0000-WVR Service is not available – contact the WSC to have a Provider Selection Record for your organization added to the consumer's record.

7. Update the number of units to 1.

Activity Services	
Service *	0000-WVR Provider Additional Documentation Clear Total Cost \$0.00
Units *	
Rate	\$0.00
Secondary Code	0000-WVR
Unit Type	Units

- 8. Provider Documentation Type = Monthly Summary
- 9. Note Enter the summary of the activities that took place during the quarter, including the consumer's progress toward achieving goals, in accordance with the iBudget handbook.
- 10. Status = Complete



opd iConn	ect			Lyre Demonstrations 12/1/2022 9:50 AM	Provider Documentatio
File					
Activity Times					
Start Date *	Start Time	End Date *	End Time	Total Minutes	
07/30/2022	01 V 00 V PM V	07/30/2022	01 🗸 15 🗸 PM 🗸	15	Delete
12022	<b>~ ~ ~</b>	2/01/2022	<b>v v v</b>		Add
Authorization					
Auth ID			PA Number		
Activity Details					
Division	APD 🗸		Worker*	Ci	ear Details
Provider	Simulation Provide V Detail	S	Status	Complete ¥	
Activity Service			1		
Service *	0000-WVR Provider Addition	al Documentation Clear	Total Cost	\$0.00	
Units *	1				
Rate	\$0.00				
Secondary Code	0000-WVR				
Unit Type	Units				
Documentation					
			<b>B</b> <i>I</i> <u>U</u> 16p	x • A •	
Provider Documentation Type Dr	nnual Report aily Attendance Log onthily R&B rogress Note uarterly Summary	y Summary ANote *	Budgeting Waive	an example and may not meet the Development ar Services Coverage and Limitations Handbook ocumentation meets all the necessary requireme	Requirements. Make
Se	ervice Log	*	Service: Occupa	tional Therapy, 1st Summary (July 1,	2021 - July 30,2021)
			In the last (	r. Lyre had made excellent progress towards hi	s OT Goals. He worked

#### 11. Click File > Save and Close Provider Documentation

#### **Quarterly Summary**

A quarterly summary is a written summary of the activities that took place during each quarter, including the consumer's progress toward achieving goals. The third quarterly summary is also the annual report. The third quarterly summary also serves as the annual report and must include a summary of the previous three quarters. Add the Quarterly Summary as a separate activity using the 0000-WVR Code.

Please refer to <u>the Intro to completing Provider Documentation Screens with</u> <u>detailed images for instructions</u> on how to complete each field.

Add the Quarterly Summary as a separate activity using the 0000-WVR Code:

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

opd iCoi	mect	Welcome, <b>1</b> 1/30/2022 1:02 PM V	My Dashboard Sign Out	Role Service Provider	v GO
File Reports					
Oulok Soo	rah				

2. Navigate to the Consumer's record and click the **Provider Documentation** tab > click **File > Add Provider Documentation.** 



opc	iCoi	nnect			Last Updated by	Demonstratio /2022 11:45:3	Cardina and Anna	Doc	Provider cumentation	Sign Out	Sen	ole vice Provider	~ (	GO
File	Tools	Ticklers												
Add Provide Print	er Docume	entation												
		Quick Sear			Consumers		✓ Last N	ame		<b>v</b> G0	$\odot$	ADVANCED SEARCH		
			$\backslash$		MY	DASHBOARD	CONSUME	RS	PROVIDERS					
					/									
Demonstr	rations, L	yre (215662)												
		Diagnosis I Demographics	Medications Notes	Provid Forms	er Documentation Appointments	Contacts								

- 3. The Provider Documentation Details page is displayed. Update the following fields:
  - a. Start Date: Select the Date of Service.
  - b. Start Time: Select the start time of the service
  - c. End Date: Select the Date of Service.
  - d. End Time: Select the end time of the service
  - e. Click Add.

#### 4. SKIP the AUTH ID Section

- 5. Since the Auth usually populates the following fields, make sure to complete the following additional sections (select from dropdown menu).
  - a. Division = APD
  - b. Provider = The organization represented

Authorization	
Auth ID	
Activity Details	
Division	
Provider	<b></b>
Activity Services	Simulation Provider

6. 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 0000-WVR Service.

logVendorServiceSelectPopUp											
Search	By: Secondar	y Code 🗸 Sea	rch Text:	ch C	ancel						
ServiceID	ServiceCode	SecondaryCode	Service	UnitCost	UnitType	EffectiveDate	EndDate	VServiceID	MaxAuth	Used	Remaining
5975	0000-WVR	0000-WVR	Provider Additional Documentation	0.00	Units	07/01/2021		251236	0	0	0

If the 0000-WVR Service is not available – contact the WSC to have a Provider Selection Record for your organization added to the consumer's record.

7. Update the number of units to 1.



Document Services using the Provider Documentation tab

Activity Services		
Service *	0000-WVR Provider Additional Documentation Clear Total Cost \$0.	.00
Units *		
Rate	\$0.00	
Secondary Code	0000-WVR	
Unit Type	Units	

- 8. Provider Documentation Type = Quarterly Summary
- 9. Note Enter the summary of the activities that took place during the quarter, including the consumer's progress toward achieving goals, in accordance with the iBudget handbook.
- Provider opd iConnect Lyre Demonstrations Documentation 12/1/2022 9:50 AM File Activity Times Start Date \* Start Time End Date \* End Time Total Minute: 01 V 00 V PM V 09/30/2022 0 09/30/2022 0 01 V 15 V PM V 15 022 0 **v v v** 01/2022 0 **~ v** ~ Auth ID PA Number Activity Details Division APD 🗸 Worker\* ... Clear Details Provide Simulation Provide V Details Status Complete V Activity Service Service <sup>1</sup> 0000-WVR Provider Additional Documentation Total Cos \$0.00 Units \* 1 Rate \$0.00 0000-WVR Secondary Code Unit Type Units Documentatio B I ∐ 10pt - A -Annual Report Daily Attendant Monthly R&B Monthly Summ Progress Note Quarterly Summar ing is an example and may not meet the Developme Waiver Services Coverage and Limitations Handho ntal Disabilities Ir Budgeting Waiver Services Coverage and Limitations Handbook Requirements. Make sure that your documentation meets all the necessary requirements and do not copy this Provider Documentation Type Note Service: Physical Therapy, 1st Quarterly Summary (July 1, 2021 - September 30,2021) Service Log In the last Quarter. Lvre had made excellent progress towards his PT Goals. He worked
- 10. Status = Complete

11. Click File > Save and Close Provider Documentation.

#### **Annual Report**

An annual report is a report of the supports and services received by a consumer throughout the year, a description of progress toward meeting their goals, and any pertinent information about significant events that occurred in the consumer's life during the previous year. Add the Annual Report as a separate activity using the 0000-WVR Code.

Please refer to <u>the Intro to completing Provider Documentation Screens with</u> <u>detailed images for instructions</u> on how to complete each field.



Add the Annual Report as a separate activity using the 0000-WVR Code:

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

opd iConnect	Welcome, Welcome, Sign Ou 11/30/2022 1:02 PM V	t Role Service Provider
File Reports		<b>↑</b>
Quick Search		

2. Navigate to the Consumer's record and click the **Provider Documentation** tab > click **File > Add Provider Documentation.** 

op	0 iCo	nnect		Lyre Demonstrations Last Updated by at 11/30/2022 11:45:34 AM	<b>P</b> rovider cumentation	Sign Out	Role Service Provider	▼ G0
File	Tools	Ticklers						
Add Prov Print	ider Docun	nentation						
		Quick Sea		Consumers		GO	O ADVANCED SEARCH	
			$\mathbf{\Lambda}$	MY DASHBOARD CONSUMERS	PROVIDERS			
Demon	strations,	Lyre (215662	)					
		Diagnosis Demographic	Medications s Notes	rovider Documentation Contacts ms Appointments				

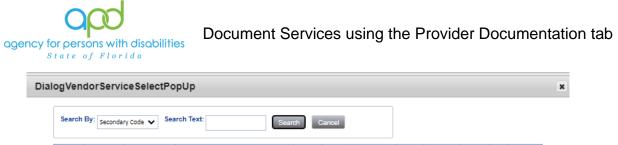
- 3. The Provider Documentation Details page is displayed. Update the following fields:
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  - b. Start Time: Select the start time of the service
  - c. End Date: Select the Date of Service.
  - d. End Time: Select the end time of the service
  - e. Click Add.

## 4. SKIP the AUTH ID Section

- 5. Since the Auth usually populates the following fields, make sure to complete the following additional sections (select from dropdown menu).
  - a. Division = APD
  - b. Provider = The organization represented

Authorization	
Auth ID	
Activity Details	
Division	
Provider	~ ·
Activity Services	Simulation Provider

6. 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 0000-WVR Service.



 ServiceD
 ServiceCode
 SecondaryCode
 Service
 UnitCost
 UnitVype
 EffectiveDate
 EndDate
 VServiceID
 MaxAuth
 Used
 Remaining

 5975
 0000-WVR
 0000-WVR
 Provider Additional Documentation
 0.00
 Units
 07/01/2021
 251236
 0
 0
 0

If the 0000-WVR Service is not available – contact the WSC to have a Provider Selection Record for your organization added to the consumer's record.

7. Update the number of units to 1.

Activity Services		
Service *	0000-WVR Provider Additional Documentation Clear Total Cost \$0	.00
Units *	1	
Rate	\$0.00	
Secondary Code	0000-WVR	
Unit Type	Units	

- 8. Provider Documentation Type = Annual Report
- Note = Enter the supports and services received by a consumer throughout the year, a description of progress toward meeting their goals, and any pertinent information about significant events that occurred in the consumer's life during the previous year.
- 10. Status = Complete

opol iConne	ect			Lyre Demon: 12/1/2022 9	
File					
Activity Times					
Start Date *	Start Time	End Date *	End Time	Total Minutes	
06/30/2022	01 V 00 V PM V	06/30/2022	01 V 15 V PM V	15	Delete
12/01/2012		12/1/2022			Add
Autorization					
Auth ID		·	PA Number		
Activity Details					
Division	APD 🗸		Worker*	Reside, Resident	Clear Details
Provider	Simulation Provide V Details		Status	Complete 🗸	
Activity Services					
Service *	0000-WVR Provider Additional	Documentation Clear	Total Cost	\$0.00	
Units *	1				
Rate	\$0.00				
Secondary Code	0000-WVR				
Unit Type	Units				
Documentation					
Provider Documentation Type * Qu Set	aily Attendance Log onthily R&B onthily R&B summary rogress Note auterly Summary auterly Summary autorly Summa	Report A	Budgeting Waiv sure that your d example. Service: Respira	Ipt • A • an example and may not meet the Dev rev Services Coverage and Limitations is locumentation meets all the necessary if atory Therapy. Annual Report (July 1, 2 Live had made excellent progress tow	Handbook Requirements. Make requirements and do not copy this

Click File > Save and Close Provider Documentation.