

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.

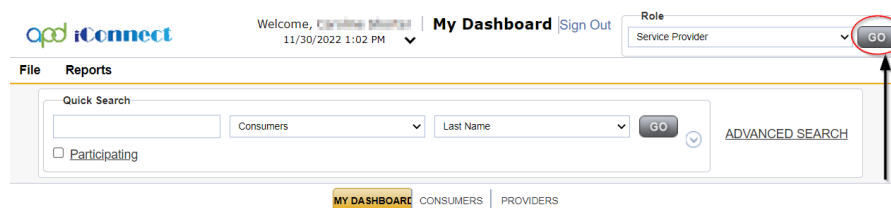
This job aid will encompass using iConnect to record services using the Provider Documentation Tab of the Consumer's record. If services are required to use the EVV system, this aid will not address those tasks, please refer to the [EVV Information and Training Material](#) website.

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 [Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook](#) 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.

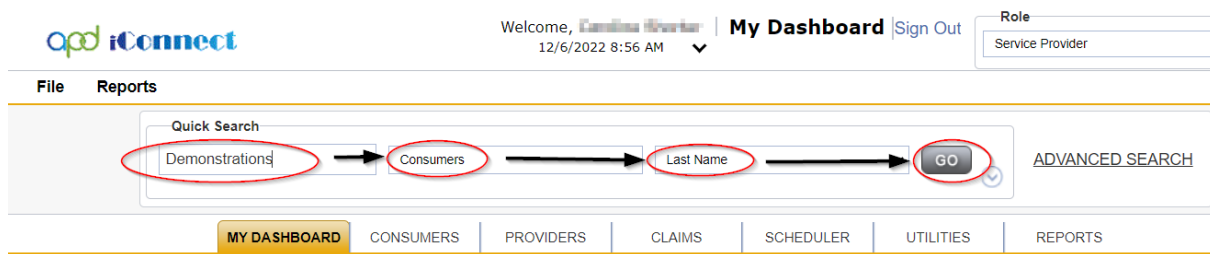
Intro to completing Provider Documentation Screens with detailed images

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

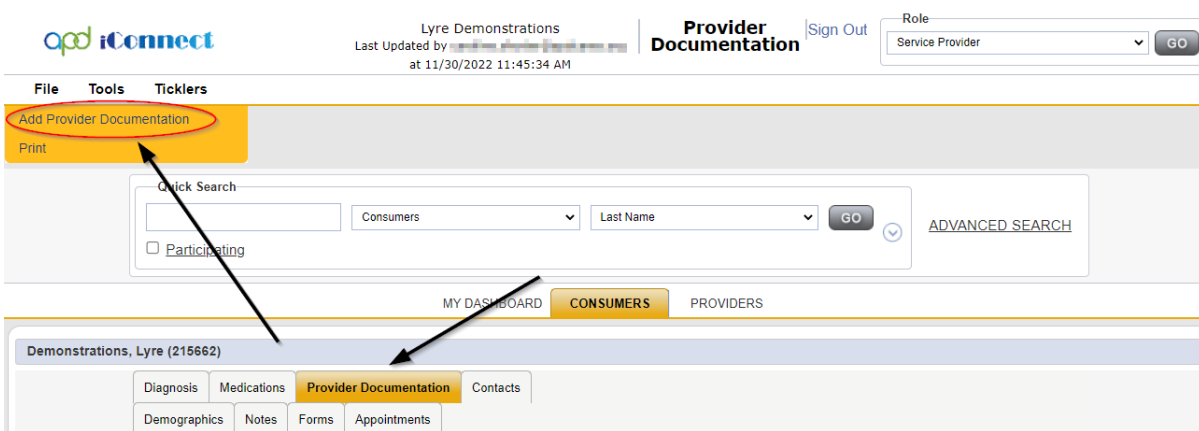


2. Navigate to the Consumer's record.

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

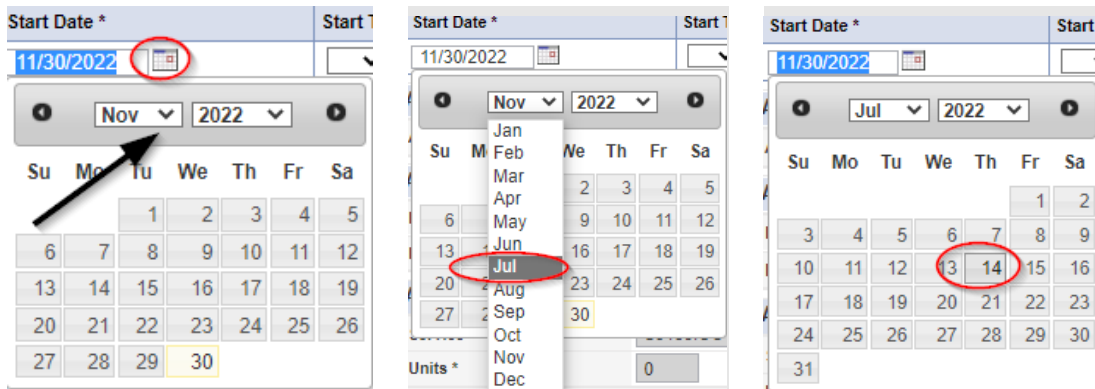


3. Click the **Provider Documentation** tab > click **File > Add Provider Documentation**.

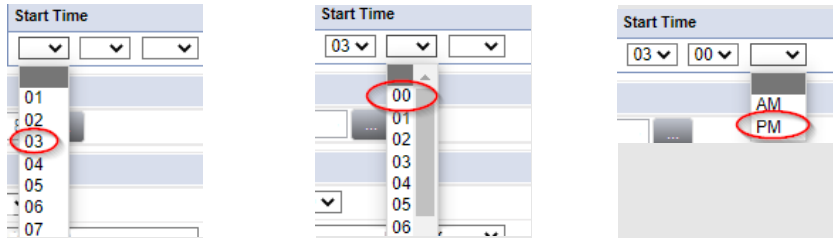


4. The Provider Documentation Details page is displayed. Update the following fields:

- 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.

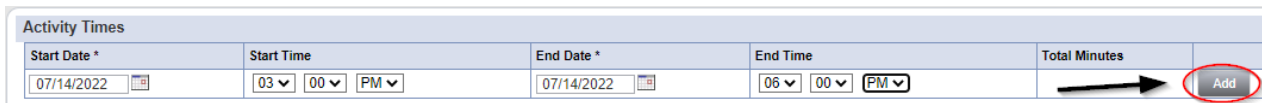


- b. Start Time: Use the Dropdown Menus to make the selections. Select the Hour, the Minute, and AM/PM.



- 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.
- e. Click **Add**.

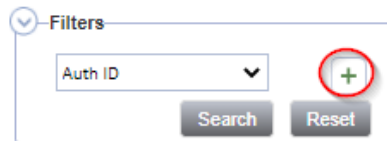
i. Notice a new line that appears for dates and times, do not add a second date unless instructed otherwise.



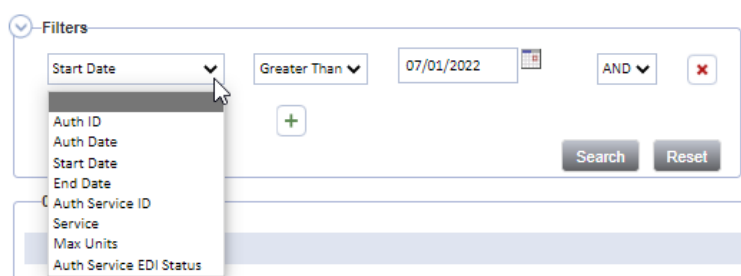
- 5. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations. There are specific circumstances in which you may skip this step, but that will be listed in the documentation specific instructions.



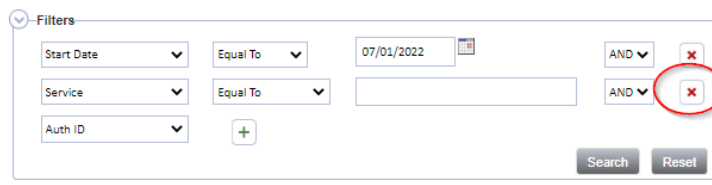
- a. Using the Filter Options can assist with locating the necessary Auth ID.
- b. Use the Green + to add filters.



- c. Make the appropriate selections from the dropdown menus.



- d. Use the Red X to remove filters.



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



Filters

Start Date Equal To 07/01/2022 AND

Auth ID

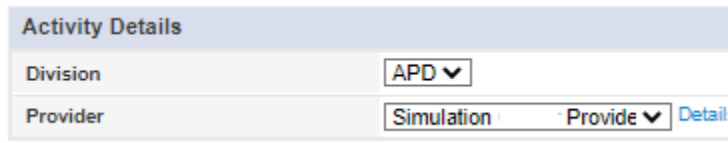
Search Reset

1 Auth Search record(s) returned - now viewing 1 through 1

Auth ID	Auth Date	Provider	Start Date	End Date
257185	11/30/2022	Simulation Provider	07/01/2022	06/30/2023

First Previous Records per page 15 Next Last

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

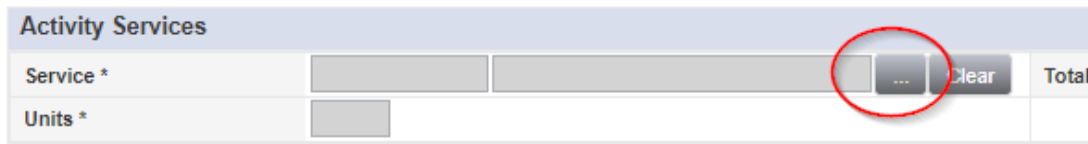


Activity Details

Division APD

Provider Simulation Provide Details

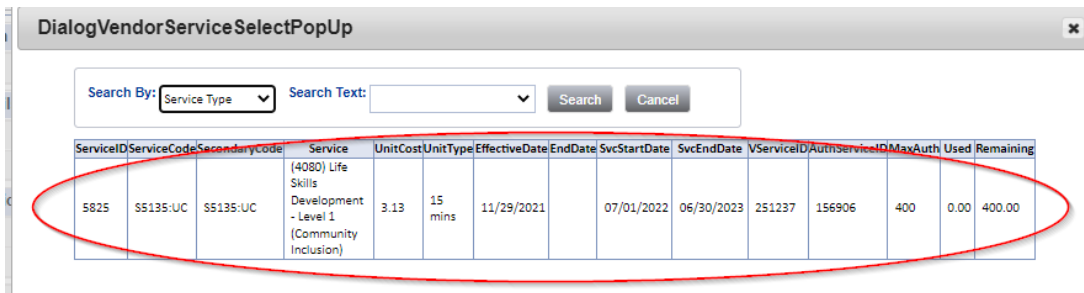
8. Click the box next to the Service field that contains an ellipsis (three dots) to display a list of services for this authorization.



Activity Services

Service *	Units *	Total
...		

- a. Select the Service.



DialogVendorServiceSelectPopUp

Search By: Service Type Search Text:

Search Cancel

ServiceID	ServiceCode	SecondaryCode	Service	UnitCost	UnitType	EffectiveDate	EndDate	SvcStartDate	SvcEndDate	VServiceID	AuthServiceID	MaxAuth	Used	Remaining
5825	S5135:UC	S5135:UC	(4080) Life Skills Development - Level 1 (Community Inclusion)	3.13	15 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.
9. 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.

Activity Services		Total Cost
Service *	85135.UC	\$37.58
Units *	12	
Rate	\$3.13	
Secondary Code	S5135.UC	

Activity Services		Total Cost
Service *	85000.UC	\$0.00
Units *	1	
Rate	\$0.00	
Secondary Code	85000.UC	
Unit Type	Units	

10. Provider Documentation Type = Select as needed.

a. Use the scrollbar to see all the selections.

Documentation	
Provider Documentation Type *	<ul style="list-style-type: none"> 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 *	<ul style="list-style-type: none"> Annual Report Daily Attendance Log Monthly R&B Monthly Summary Progress Note Quarterly Summary Trip Log

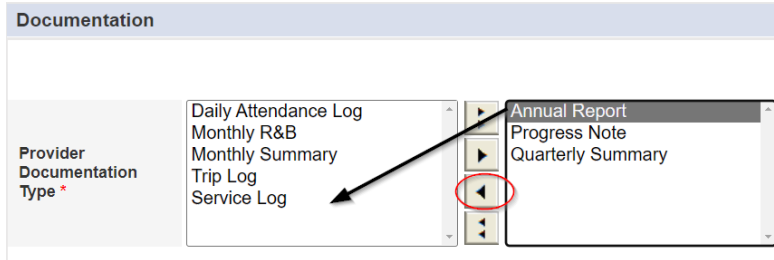
c. Ctrl + Mouse Clicks can be used to make multiple selections at one time (example below).

Documentation	
Provider Documentation Type *	<ul style="list-style-type: none"> Annual Report Daily Attendance Log Monthly R&B Monthly Summary Progress Note Quarterly Summary Trip Log

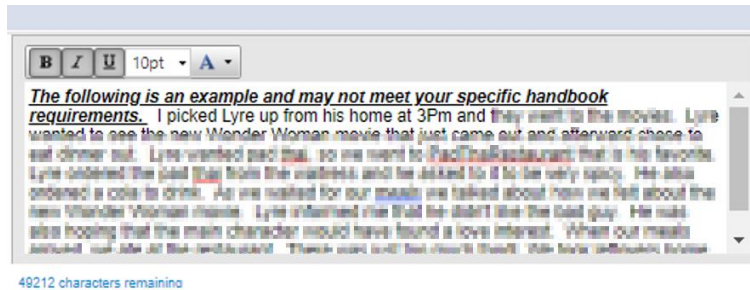
d. Selections should be moved to the box on the right.

Documentation	
Provider Documentation Type *	<ul style="list-style-type: none"> Daily Attendance Log Monthly R&B Monthly Summary Trip Log Service Log

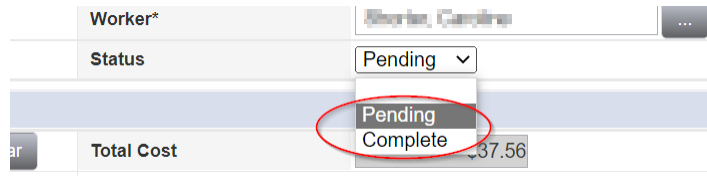
- e. If incorrect selections were made, use the carat pointing to the left to move those selections back into the original menu on the left.
 - i. Single carat moves the selected options.
 - ii. Double carats move all the items.



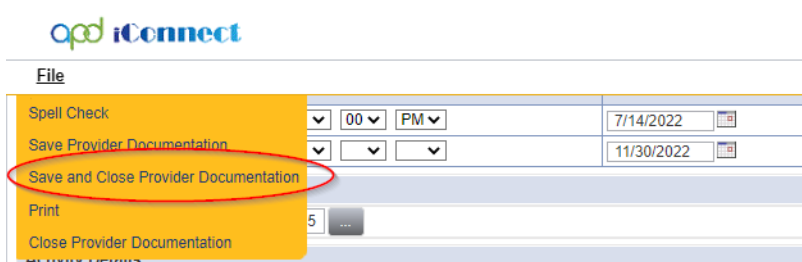
11. Note - Enter details of the services provided to the consumer by typing in the text box.



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.



13. File > Save and Close Provider Documentation.



Daily Attendance Log

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

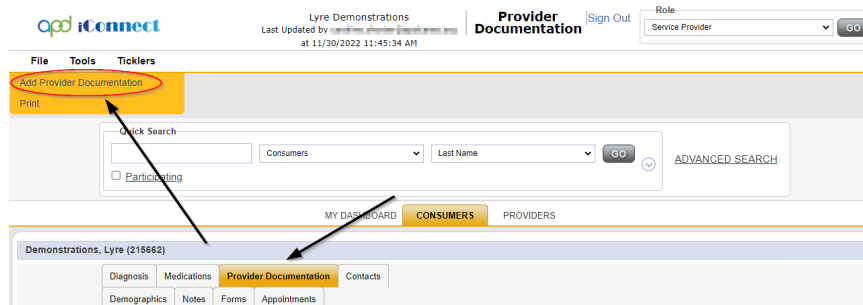
- Life Skills Development 3 (Adult Day Training)
- Life Skills Development 4 (Prevocational Services)
- Residential Habilitation Services

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.

1. To begin, log into iConnect and set Role = **Service Provider** or **Service Provider Worker**. 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

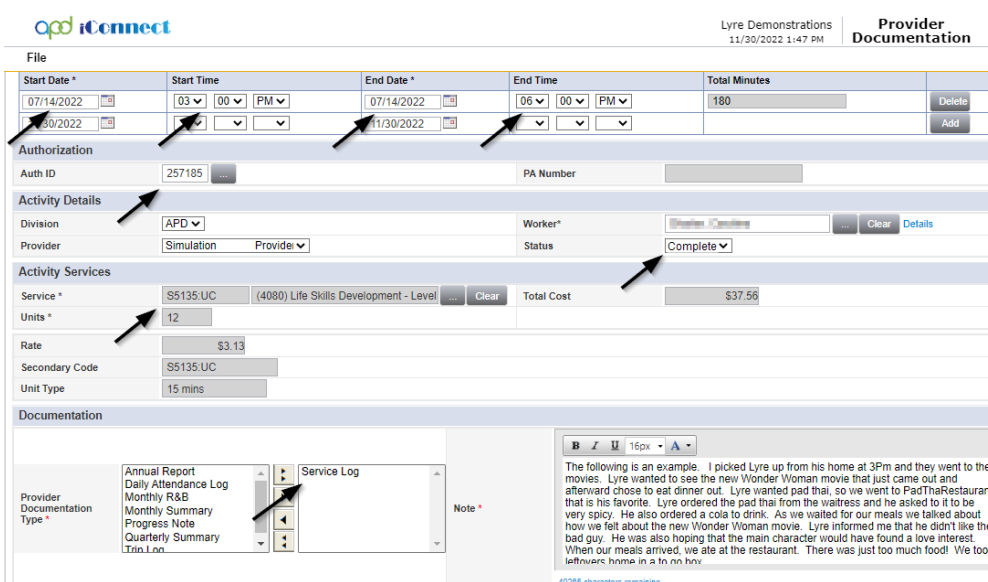
- **the week** when documenting daily attendance for LSD3 and LSD4
- **the month** when documenting daily attendance for Residential Habilitation Services
 - Additionally, when Residential Habilitation services are approved (with either the monthly or the daily rate) the start date can be the beginning 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.



The screenshot shows the 'iConnect' Provider Documentation form. Arrows point to the following fields:

- Start Date:** 07/14/2022
- Start Time:** 03:00 PM
- End Date:** 07/14/2022
- End Time:** 06:00 PM
- Total Minutes:** 180
- Auth ID:** 257185
- Division:** APD
- Provider:** Simulation
- Worker:** Simulation
- Status:** Complete
- Service:** S5135:UC (4080) Life Skills Development - Level
- Units:** 12
- Rate:** \$3.13
- Total Cost:** \$37.56
- Documentation Type:** Service Log
- Note:** The following is an example. I picked Lyre up from his home at 3Pm and they went to the movies. Lyre wanted to see the new Wonder Woman movie that just came out and afterward chose to eat dinner out. Lyre wanted pad thai, so we went to PadThaiRestaurant that is his favorite. Lyre ordered the pad thai from the waitress and he asked to it to be very spicy. He also ordered a cola to drink. As we waited for our meals we talked about how we felt about the new Wonder Woman movie. Lyre informed me that he didn't like the bad guy. He was also hoping that the main character would have found a love interest. When our meals arrived, we ate at the restaurant. There was just too much food! We took leftovers home in a 1h on hwy.

11. Click File > Save and Close Provider Documentation.

Monthly Summary

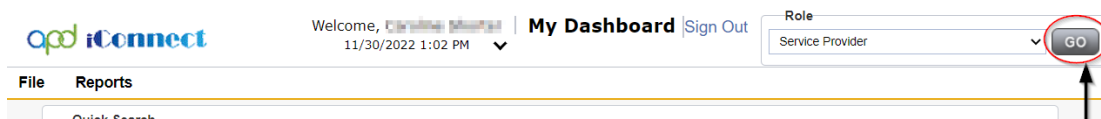
A monthly summary is a written summary of the activities that took place during each month, including the consumer's progress toward achieving goals. **Add the Monthly Summary as a separate activity using the 0000-WVR Code.**

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

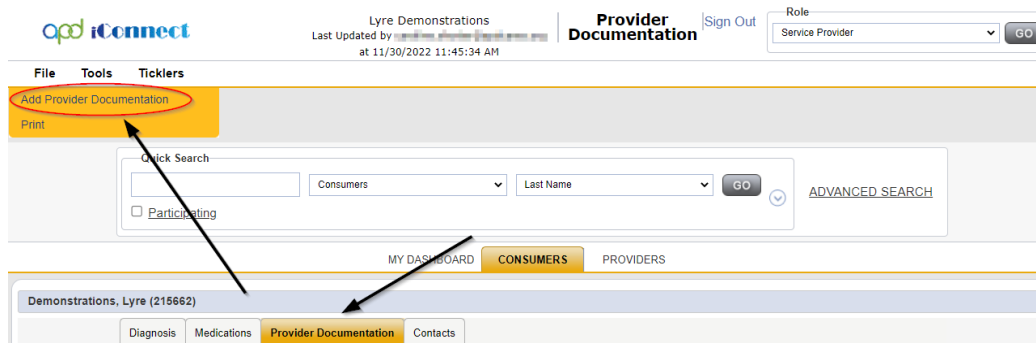
For ResHab Providers: Monthly summaries may be submitted if the provider chooses to do a monthly summary each month rather than a quarterly summary

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

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



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



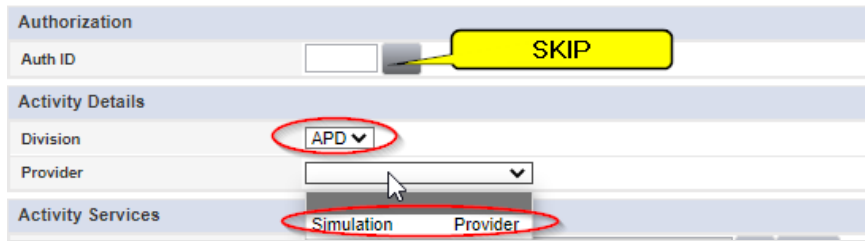
- The Provider Documentation Details page is displayed. Update the following fields:

- Start Date: Select the Date of Service.
- Start Time: Select the start time of the service
- End Date: Select the Date of Service.
- End Time: Select the end time of the service
- Click **Add**.

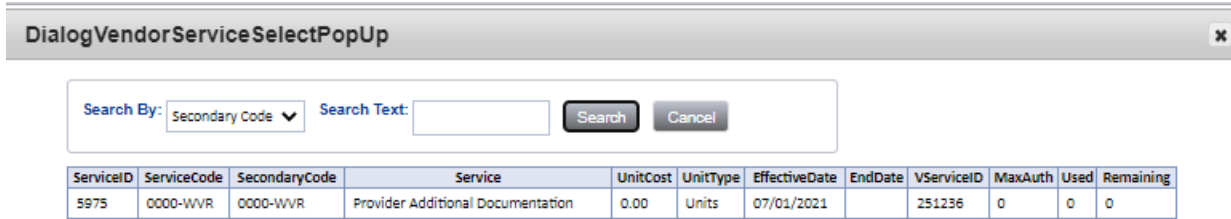
4. **SKIP the AUTH ID Section**

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

b. Provider = The organization represented



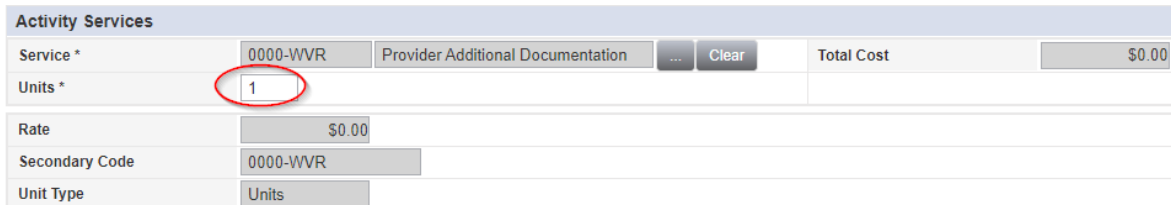
- Click the box next to the Service field that contains an ellipsis (three dots) to display a list of services for this authorization. Select the 0000-WVR Service.



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.



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 = Monthly Summary

- 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

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

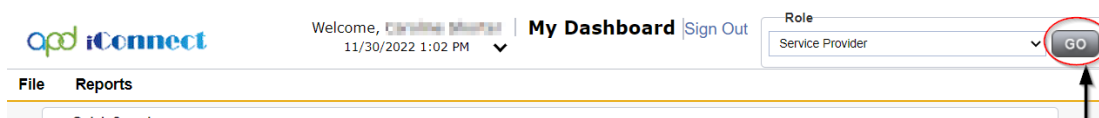
Quarterly Summary

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.

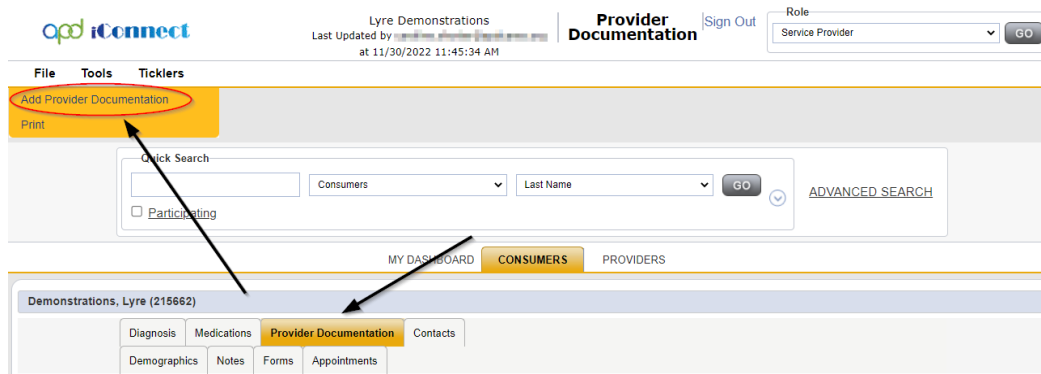
Please refer to [the Intro to completing Provider Documentation Screens with detailed images for instructions](#) on how to complete each field.

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

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



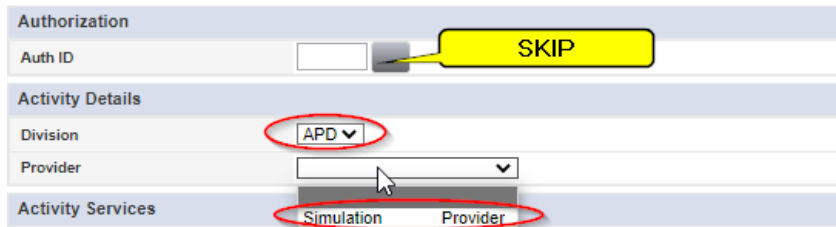
2. Navigate to the Consumer’s record and click the **Provider Documentation** tab > click **File > Add Provider Documentation**.



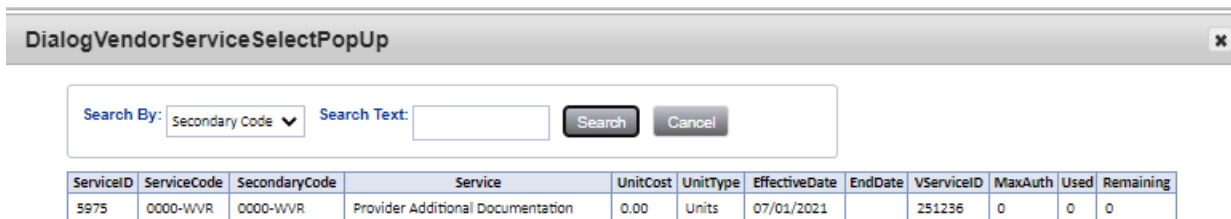
3. The Provider Documentation Details page is displayed. Update the following fields:
 - a. Start Date: Select the Date of Service.
 - b. Start Time: Select the start time of the service
 - c. End Date: Select the Date of Service.
 - d. End Time: Select the end time of the service
 - e. Click **Add**.

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.



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.

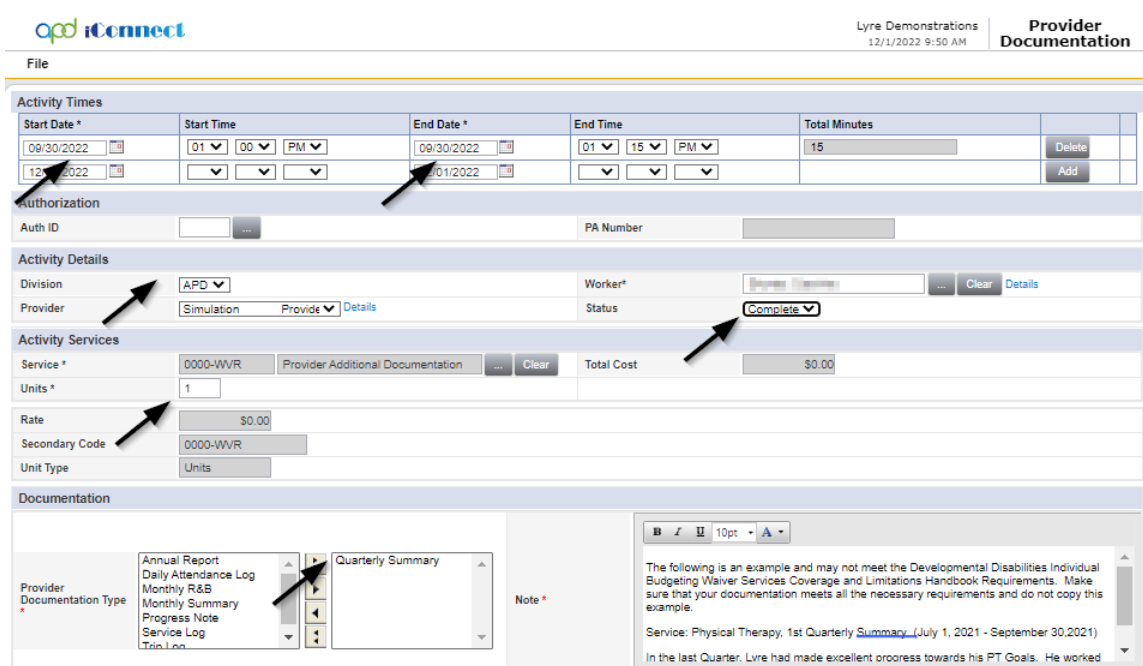
7. Update the number of units to 1.

Activity Services			
Service *	0000-WVR	Provider Additional Documentation	Clear
Units *	1		Total Cost \$0.00
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.

10. Status = Complete



The screenshot shows the 'Provider Documentation' interface. Key elements include:

- Activity Times:** A table with columns for Start Date, Start Time, End Date, End Time, and Total Minutes. An arrow points to the 'End Date' field.
- Authorization:** Fields for Auth ID and PA Number.
- Activity Details:** Fields for Division (APD), Provider (Simulation), Worker*, and Status (Complete). An arrow points to the 'Status' dropdown.
- Activity Services:** A summary table with Service*, Units*, Rate, Secondary Code, and Unit Type. An arrow points to the 'Units*' field.
- Documentation:** A dropdown menu for 'Provider Documentation Type' with 'Quarterly Summary' selected. An arrow points to this selection.

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

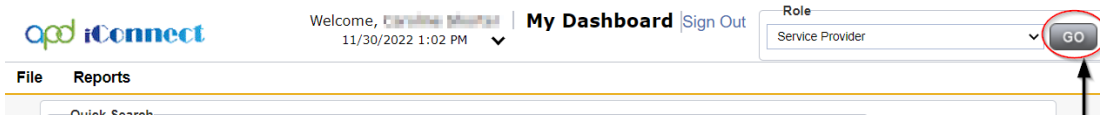
Annual Report

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.**

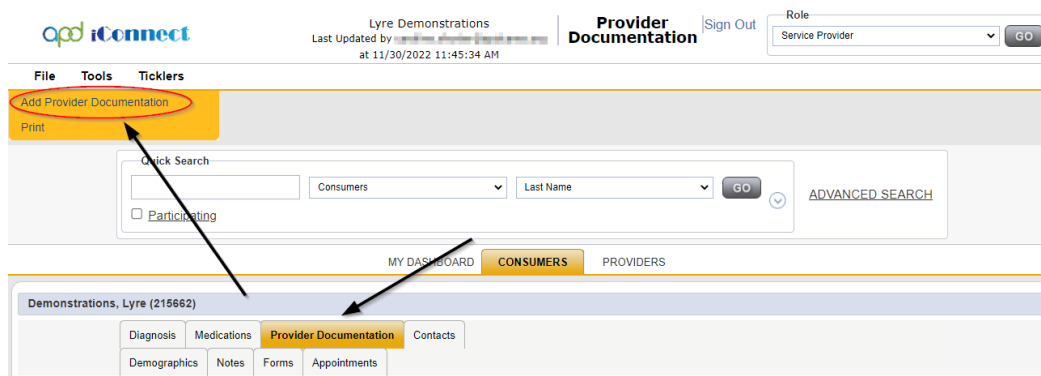
Please refer to [the Intro to completing Provider Documentation Screens with detailed images for instructions](#) on how to complete each field.

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

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



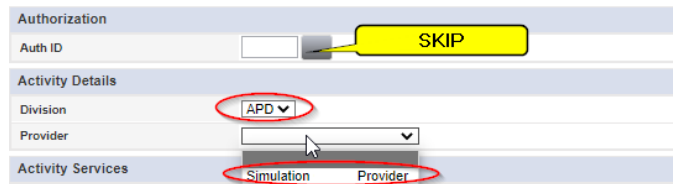
2. Navigate to the Consumer's record and click the **Provider Documentation** tab > click **File > Add Provider Documentation**.



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**.

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.

DialogVendorServiceSelectPopUp

Search By: Secondary Code Search Text: Search Cancel

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.

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

9. 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

APD iConnect Lyre Demonstrations 12/11/2022 9:50 AM **Provider Documentation**

File

Activity Times

Start Date *	Start Time	End Date *	End Time	Total Minutes	
08/30/2022	01:00 PM	08/30/2022	01:15 PM	15	Delete
12/01/2022		12/01/2022			Add

Authorization

Auth ID: PA Number:

Activity Details

Division: APD Worker*: Clear Details

Provider: Simulation Provide 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: **Annual Report**

Note *

The following is an example and may not meet the Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook Requirements. Make sure that your documentation meets all the necessary requirements and do not copy this example.

Service: Respiratory Therapy, Annual Report (July 1, 2021 - June 30, 2022)

In the last year, Lyre had made excellent progress towards his RT Goals. He worked on

Click File > Save and Close Provider Documentation.