



# 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

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

ope	iConnect	Welcome, 11/30/2022 1:02 PM 🗸	My Dashboard Sign Out	Role Service Provider	~ G0
File	Reports				
	Quick Search				
		Consumers 🗸	Last Name	GO	ADVANCED SEARCH
C	Participating			۲	



- 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 iConne	ct		Welcome, 12/6/2022 8	:56 AM 🗸	My Dashboard	Sign Out	Role Service Provider	
File	Reports								
	Quick	Search	Consumers	)	Last Name	>	<b>G</b> 0	ADVANCED SEARC	Н
		MY DASHBOARD	CONSUMERS	PROVIDERS	CLAIMS	SCHEDULER	UTILITIES	REPORTS	

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

op	d iCo	nnect		Lyre [ Last Updated by at 11/30	Demonstrations /2022 11:45:34 AM	Provider Documentation	Sign Out	Role Service Provider	• G0
File	Tools	Ticklers							
Add Prov Print	rider Docur	mentation							
		Quick Sea	rch ating	Consumers	► Last Na	me	• GO	O ADVANCED SEARCH	
			$\backslash$	MY	DASHBOARD CONSUME	PROVIDERS			
Demon	strations,	Lyre (215662	, `						
		Diagnosis Demographic	Medications s Notes	Provider Documentation Forms Appointments	Contacts				

- 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.

Start D	)ate *					Start 1	Start D	ate *				Start 1		Start D	ate *					Start 7
11/30	/2022	C				<b>``</b>	11/30	/2022	•				Ī	11/30	/2022		a			
0	N		2 20	22	~	0	0	Nov	✓ 20	22	~	0	L	0	Jı	u N	/ 20	22	~	0
Su	Me	1	We	Th	Fr	Sa	Su	Jan M Feb	Ne	Th	Fr	Sa		Su	Мо	Tu	We	Th	Fr	Sa
		14				-		Apr	2	3	4	5	4						1	2
-	_	1	2	3	4	5	6	May	9	10	11	12		3	4	5	6	7	8	9
6	7	8	9	10	11	12	13	Jun	16	17	18	19		10	11	12	63	14	15	16
13	14	15	16	17	18	19	20	2 Aug	23	24	25	26	- 1	17	10	10	20	21	22	22
20	21	22	23	24	25	26	27	2 Sep	30				4	17	10	19	20	21	22	23
20			20	24	20	20	£	- Oct						24	25	26	- 27	- 28	- 29	- 30
27	- 28	29	30				Units *	Dec			0			- 31						



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

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	Ň	Greater Than 🗸	07/01/2022	 AND 🗸	×
Auth ID	<b>N</b> 5	+			
Auth Date				 _	
Start Date				 Search	Reset
End Date					
C Auth Service ID	_				
Service					
Max Units					
Auth Service EDLS	tatus				

d. Use the Red X to remove filters.



Start Date	~	Equal To 🗸	·	07/01/2022	AND 🗸
Service	~	Equal To	~		AND V
Auth ID	~	+			

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

sta	art Date		✓ Ec	qual To	~	07/01/2022		AND	✓ X	
u	uth ID		~	+						
								Search	Reset	
								and a design of the local distance of the lo		
	uth Search	recor	d(s) returne	d - now	viewing	through 1				
A	uth Search	n recor	d(s) returne	ed - now	viewing '	1 through 1				
41	uth Search	n recor	d(s) returne	ed - now	viewing '	1 through 1				
1	uth Search Auth ID	n recor	d(s) returne Auth Dat	ed - now	viewing '	1 through 1 Prov	ider		Start Date	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				$\sim$	
Service *				(	lear Total
Units *				$\smile$	
a. Select the S DialogVendorServiceSelec	ervice. PopUp				×
Search By: Service Type	Search Text:	Search	Cancel	aniralDâr <del>in Sprins D</del> Mayâr	th Used Remaining
5825 \$5135:UC \$5135:UC	(4080) Life Skills Development -Level 1 (Community Inclusion)	11/29/2021 07/	01/2022 06/30/2023 2	51237 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						
Service *	95105/9C (d	IIII Life Bills Development - Level	Clear Total	Cost	\$37.56	
Units *	12					
Rate	\$3.13					
Secondary Code	S5135:UC					
Activity Services						
Service *	poon-waik	Presider Additional Generalization	Clear	Total Cost		\$0.00
Units *						
Rate	\$0.00					
Secondary Code	0000.9VV#					
Unit Type	Units					

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

Documentation		
Provider Documentation Type *	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	

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

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

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	

- 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.



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.



apd iConnect		
<u>File</u>		
Spell Check	✓ 00 ✓ PM ✓	7/14/2022
Save Provider Documentation		11/30/2022
Save and Close Provider Docume	intation	
Print	5	
Close Provider Documentation		





# Daily Progress Note

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

- Special Medical Home Care
- Supported Living Coaching
- Dietitian Services
- Occupational Therapy
- Physical Therapy
- Residential Nursing
- Respiratory Therapy
- Skilled Nursing
- Speech Therapy
- Specialized Mental Health Counseling

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

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

IMPORTANT: Each Progress Note Activity should contain one date of service. **DO NOT ADD MULTIPLE DATES** 



- 4. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations.
- 5. Click the Authorization.

10. Status = Complete.

- 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. Note the Total Cost value changes as the number of Units change.
- 8. Provider Documentation Type = Progress Note
  - a. If additional selections are needed, make those additional selections too, such as the Quarterly Summary or Annual Report (see next sections for more information)
- 9. Note Enter details of the services provided to the consumer.

opd iCom	nect			Lyre Demonstration 12/1/2022 8:17 AM	<ul> <li>Provider</li> <li>Documentation</li> </ul>
File					
Activity Times					
Start Date *	Start Time	End Date *	End Time	Total Minutes	
07/21/2022	01 V 00 V PM V	07/21/2022	02 V 00 V PM V	60	Delete
12 2022		2/01/2022			Add
Authorization	/	1			
Auth ID	257185		PA Number		
Activity Details					
Division	APD 🗸		Worker*	The sector of	Clear Details
Provider	Simulation Provide V		Status	Complete 🗸	
Activity Services			2	1	
Service *	92507:UC (4260) Speed	ch Therapy	ear Total Cost	\$64.08	
Units *	1				
Rate	\$16.02				
Secondary Code	92507:UC				
Unit Type	15 mins				
Documentation					
			B / U 100	· • A •	
A Provider Documentation Type * S	Innual Report laily Attendance Log lonthly R&B lonthly Summary luarterly Summary	gress Note *	The following is a Budgeting Waive sure that your doo example. Provided 1 hour o following goals:	or example and may not meet the De r Services Coverage and Limitations comentation meets all the necessary of Speech Therapy and Lyre has made	evelopmental Disabilities Individua Handbook requirements. Make requirements and do not copy thi de moderate improvement to the
f	rin Loa	*	Swallowing: Lyle	is now able to swallow thick liquids.	He has made a 10% improveme



## 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. There are two options to enter the Monthly Summary:

**First Option:** Include the Monthly Summary in the final Progress Note for the month.

**Second Option:** 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.

Include the Monthly Summary in the final Progress Note for the Month:

- To begin, log into iConnect and set Role = <u>Service Provider</u> or <u>Service</u> <u>Provider Worker</u>. 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. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations.
- 5. Click the Authorization.



10. Status = Complete.

Document Services using the Provider Documentation tab

- 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. Note the Total Cost value changes as the number of Units change.
- 8. Provider Documentation Type = Service Log or Progress Note
  - a. If additional selections are needed, make those additional selections too, such as:
    - i. Monthly Summary
    - ii. Annual Report
- 9. Note Enter details of the services provided to the consumer and the summary of the activities that took place during the month, including the consumer's progress toward achieving goals, in accordance with the iBudget handbook.

opd iConneo	xt.		Lyre Demonstrations Prov 12/1/2022 8:17 AM Docume	rovider Imentation	
File					
Activity Times					
Start Date *	Start Time	End Date *	End Time	Total Minutes	
09/30/2022	01 V 00 V PM V	09/30/2022	02 V 00 V PM V	60	Delete
12 //2022		3 01/2022 🔳	<b>/ · · · ·</b>		Add
Authorization					
Auth ID	257185		PA Number		
Activity Details					
Division	APD 🗸		Worker*	Clear C	Details
Provider	Simulation Provide V		Status Con	nplete 🗸	
Activity Services					
Service *	92507:UC (4260) Speech Therap	y Clear	Total Cost	\$64.08	
Units *	4				
Rate	\$16.02				
Secondary Code	92507:UC				
Unit Type	15 mins				
Documentation					
			<b>В</b> <i>I</i> <u>Ш</u> 16рх <b>А</b>	•	
Provider Documentation Type * Trip Lo	ttendance Log y R&B e Log g	mmary A Note *	The following is an examp Budgeting Waiver Service sure that your documental example. Provided 1 hour of Speech following goals:	ve and may not meet the Developmental Disat is Coverage and Limitations Handbook require tion meets all the necessary requirements and h Therapy and Lyre has made moderate impro	vilities Individual ments. Make do not copy this vement to the



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

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

opd iConnect		Welcome, My Dashboard Sign	Out Service Provider	~ GO
File	Reports		L	1
	Quick Saarah			

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

opd iConnect		Lyre D Last Updated by at 11/30/	Lyre Demonstrations Last Updated by at 11/30/2022 11:45:34 AM		Sign Out	Role Service Provider	♥ G0	
File	Tools Tic	klers						
Add Prov	ider Documentat	ion						
	þ	ick Search				_		
		Participating	Consumers	✓ Last	Name	♥ GO	ADVANCED SEARCH	
			MY		IERS PROVIDERS			
Demons	strations, Lyre (	215662)						
	Diag	nosis 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

Authorization	
Auth ID	
Activity Details	
Division	APD
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.

VialogVendorServiceSelectPopUp									×				
	Search By: Secondary Code 🗸 Search Text: Search Cancel												
S	erviceID	ServiceCode	SecondaryCode	Service	UnitCost	UnitType	EffectiveDate	EndDate	VServiceID	MaxAuth	Used	Remaining	
5	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 *	
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	lect			Lyre Demonstrations 12/1/2022 9:50 AM	Provider Documentation
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 V 15 V PM V	15	Delete
12 2022		2/01/2022	· · · ·		Add
Authorization		/			
Auth ID			PA Number		
Activity Details					
Division	APD V		Worker*	Cle	ar Details
Provider	Simulation Provide V Detail	5	Status	omplete 🗸	
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					
Provider Documentation Type * G S	Annual Report Jaily Attendance Log Monthly R&B Progress Note Jaurterly Summary Service Log	y Summary A Note *	B I II 16px + The following is an ex- Budgeting Waiver Ser sure that your docume example. Service: Occupational	A  - imple and may not meet the Developmenta vices Coverage and Limitations Handbook I entation meets all the necessary requirement ITherapy, 1st Summary (July 1, 2	I Disabilities Individual Requirements. Make Its and do not copy this 2021 - July 30,2021)



## 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. There are two options to enter the Quarterly Summary:

**First Option:** Include the Quarterly Summary in the last Progress Note for the Quarter.

**Second Option:** 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.

Include the Quarterly Summary in the final Progress Note for the Quarter:

- 1. To begin, log into iConnect and set Role = <u>Service Provider</u> or <u>Service</u> <u>Provider Worker</u>. Click **Go**.
- 2. Navigate to the Consumer's record and click the **Provider Documentation** tab > click **File > Add Provider Documentation.**

and the most			Lyre Demonstrations Last Updated by at 11/30/2022 11:45:34 AM		Provider	Sign Out	Role					
que reconnece						Documentation		Sen	vice Provider	▼ GO		
File	Tools	Ticklers										
Add Prov	vider Docur	nentation										
Print												
		ick Searc	:h									
					Consumers		Last Nar	ne	▼ GO			
		Participat	ing							$\odot$	ADVANCED SEARCH	
		- Lardena	1									
			$\backslash$		M	Y DASHBOARD	CONSUMER	S PROVIDERS				
					/							
Demon	strations,	Lyre (215662)										
		Diagnosis N	ledications	Provi	der Documentation	Contacts						
		Demographics	Notes	Forms	Appointments							

- 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. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations.
- 5. Click the Authorization.



Document Services using the Provider Documentation tab

- 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. Note the Total Cost value changes as the number of Units change.
- 8. Provider Documentation Type = Service Log or Progress Note
  - a. If additional selections are needed, make those additional selections too, such as:
    - i. Quarterly Summary
    - ii. Annual Report
- 9. Note Enter the details of the services provided to the consumer and 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 iConne	ct	Lyre Demonstrations 12/1/2022 8:17 AM	Provider Documentation		
File					
Activity Times					
Start Date *	Start Time	End Date *	End Time	Total Minutes	
09/30/2022	01 V 00 V PM V	09/30/2022	02 V 00 V PM V	60	Delete
12 //2022		1/2022	<b>X</b> ~ <b>~</b> ~		Add
Authorization					
Auth ID	257185		PA Number		
Activity Details					
Division	APD 🗸		Worker*		Clear Details
Provider	Simulation Provide V		Status	Complete V	
Activity Services					
Service *	92507:UC (4260) Speech Thera	py Clear	Total Cost	\$64.08	
Units *	4				
Rate	\$16.02				
Secondary Code	92507:UC				
Unit Type	15 mins				
Documentation					
			В <u>/</u> <u>Ш</u> 16рх -	A -	
Daily Mont Provider Mont Documentation Servi Type * Trip L	Attendance Log hly R&B hly Summary ce Log .og	Note *	The following is an e Budgeting Walver Se sure that your docun example. Provided 1 hour of S following goals:	xample and may not meet the Devel ervices Coverage and Limitations Ha nentation meets all the necessary re- peech Therapy and Lyre has made i	opmental Disabilities Individual ndbook requirements. Make quirements and do not copy this moderate improvement to the

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

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

op	d iConnect	Welcome, Welcome My Dashboard Sign Ou 11/30/2022 1:02 PM	Role Service Provider	~ GO
File	Reports			•
	Oular Saarah			

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

opd iConnect				Lyre Dem Last Updated by at 11/30/202	Provider Documentation	Sign Out	Role Service Provider	<b>~</b> G0	
File	Tools	Ticklers							
Add Prov Print	ider Docun	nentation							
		Cick Sear	ch ting	Consumers	✓ Last Na	me	♥ G0	O ADVANCED SEARCH	
			$\backslash$	MY DAS	BOARD CONSUME	PROVIDERS			
Demon	strations,	Lyre (215662)	1						
		Diagnosis Demographics	Medications Notes	Provider Documentation Co Forms Appointments	ntacts				

- 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.

alogVendorServiceSelectPopUp											ж	
Search By: Secondary Code V Search Text: 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 *	
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

opd iConn	Lyre Demonstration 12/1/2022 9:50 Al	ons Provider M Documentation				
File						
Activity Times						
Start Date *	Start Time	End Date *	End Time	Total Minutes		
09/30/2022	01 V 00 V PM V	09/30/2022	01 🗸 15 🗸 PM 🗸	15	Delete	
125 2022		/01/2022			Add	
Authorization		1				
Auth ID			PA Number			
Activity Details						
Division 🧹	APD V		Worker*	Depart linester	Clear Details	
Provider	Simulation Provide V Detai	s	Status	Complete V		
Activity Services			1			
Service *	0000-WVR Provider Addition	al Documentation	Total Cost	\$0.00		
Units *	1					
Rate	\$0.00					
Secondary Code	0000-WVR					
Unit Type	Units					
Documentation						
			B Z U 10e	··· • Δ ··		
A	nnual Report 🛛 🗽 Quarte	erly Summary	The following is	an example and may not meet the Developm	nental Disabilities Individual	
Provider Documentation Type	Ionthiy R&B Ionthiy Summary	Not	e * Budgeting Waive sure that your do example.	er Services Coverage and Limitations Handb ocumentation meets all the necessary require	ook Requirements. Make ements and do not copy this	
S	ervice Log	~	Service: Physica	al Therapy, 1st Quarterly <u>Summary</u> (July 1, 2	021 - September 30,2021)	
			In the last Quarter	er. Lvre had made excellent progress toward	s his PT Goals. He worked	



## **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.

**First Option:** Include the Annual Report in the last Progress Note for the year.

**Second Option:** 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.

Include the Annual Report in the final Progress Note for the year:

- 1. To begin, log into iConnect and set Role = <u>Service Provider</u> or <u>Service</u> <u>Provider Worker</u>. Click **Go**.
- 2. Navigate to the Consumer's record and click the **Provider Documentation** tab > click **File > Add Provider Documentation.**

opd iconnect				Lyre Demonstrations Last Updated by at 11/30/2022 11:45:34 AM			Provider Documentation	Sign Out	Servic	e Provider	• 60	
File	Tools	Ticklers										
Add Prov Print	rider Docur	nentation	2									
		Derticip	arch		Consumers		♥ Last	Name	• G0	0	ADVANCED SEARCH	
			$\backslash$		M	DASHBOARD	CONSUM	PROVIDERS				
Demon	strations,	Lyre (21566:	2)									
		Diagnosis	Medications	Provid	der Documentation	Contacts						
		Demographi	cs Notes	Forms	Appointments							

- 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. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations.
- 5. Click the Authorization.



Document Services using the Provider Documentation tab

- 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. Note the Total Cost value changes as the number of Units change.
- 8. Provider Documentation Type = Service Log or Progress Note
  - a. If additional selections are needed, make those additional selections too, such as:
    - i. Annual Report
- 9. Note Enter details of the services provided to the consumer and 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.

o <mark>od i©onne</mark>	et			Lyre Demonstrations 12/1/2022 8:17 AM	Provider Documentation
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	02 V 00 V PM V	60	Delete
12 //2022		1/2022			Add
Authorization					
Auth ID	257185		PA Number		
Activity Details	×				
Division	APD 🗸		Worker*		Clear Details
Provider	Simulation Provide V		Status Co	mplete 🗸	
Activity Services					
Service *	92507:UC (4260) Speech Thera	py Clear	Total Cost	\$84.08	
Units *	4				
Rate	\$16.02				
Secondary Code	92507:UC				
Unit Type	15 mins				
Documentation					
			<b>В</b> <i>I</i> <u>Ш</u> 16рх • А	•	
Provider Documentation Trip	Attendance Log hhy R&B hhy Summary ice Log Log	ort Note *	The following is an exam Budgeting Waiver Servic sure that your documents example. Provided 1 hour of Speec following goals:	ple and may not meet the Devel es Coverage and Limitations Ha stion meets all the necessary rec ch Therapy and Lyre has made r	opmental Disabilities Individual ndbook requirements. Make juirements and do not copy this noderate improvement to the

## 10. Status = Complete

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

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

opd iConnect		Welcome, Welcome Welcome Sign Out	Role Service Provider	~ GO	
File	Reports			•	
	Oular Saarah				

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

opd iConnect		Lyre Demonstrations Last Updated by at 11/30/2022 11:45:34 AM		Provider Documentation Sign Out		Role Service Provider	▼ GO		
File	Tools	Ticklers							
Add Prov Print	ider Docun	nentation							
		Chick Sear	ch <u>ting</u>	Consumers	✓ Last Na	me	♥ G0	O ADVANCED SEARCH	
			$\backslash$	MY DAS	BOARD CONSUMER	PROVIDERS			
Demon	strations,	Lyre (215662)	`						
		Diagnosis I Demographics	Medications Notes	Provider Documentation Co Forms Appointments	ntacts				

- 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	APDV
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.



10. Status = Complete

DialogVendorServiceSelectPopUp										ж			
	Search By: Secondary Code V Search Text: 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 P	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.

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	
08/30/2022	01 V 00 V PM V	06/30/2022	01 V 15 V PM V	15	Delete
12/01/22	<b>~ ~ ~</b>	1/2022	<b>~ ~ ~</b>		Add
Autorization		/			
Auth ID			PA Number		
Activity Details					
Division	APD 🗸		Worker*	Eineis Diarinas Ck	ar Details
Provider	Simulation Provide V Detail	5	Status [	Complete 💙	
Activity Services			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 I U 10pt	• A •	
Provider Documentation Type * G S S T	ality Attendance Log Ionthly R&B Ionthly Summary rogress Note Larterly Summary ervice Log	Note *	The following is an Budgeting Waiver S sure that your docu example. Service: Respirator	example and may not meet the Development iervices Coverage and Limitations Handbook mentation meets all the necessary requireme y Therapy, Annual Report (July 1, 2021 - June	al Disabilities Individual Requirements. Make Ints and do not copy this a 30,2022)
L			In the last year. Lyre	e had made excellent progress towards his R	T Goals. He worked on