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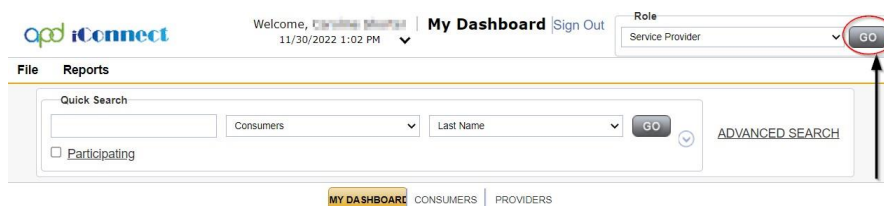
This job aid will encompass using iConnect to record services using the Provider Documentation Tab of the Consumer's record. If services are required to use the EVV system, this aid will not address those tasks, please refer to the EVV Information and Training Material website.

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)

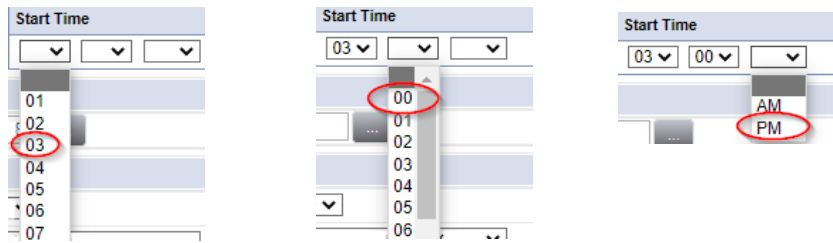   b. Ensure that the second field contains Consumers, third field contains last name and click "Go
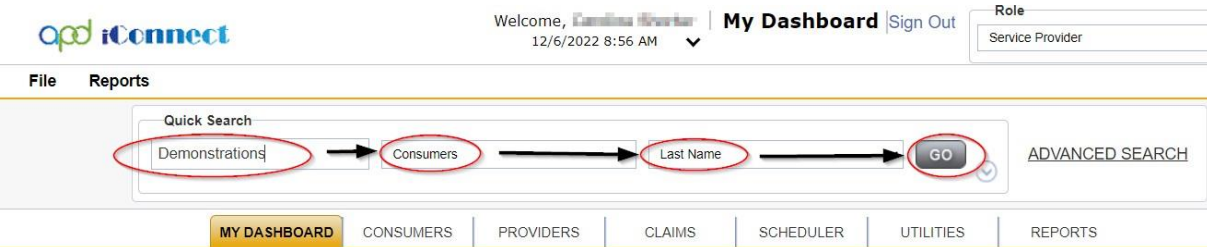
3. Click the **Provider Documentation** tab > click **File** > **Add Provider Documentation.**
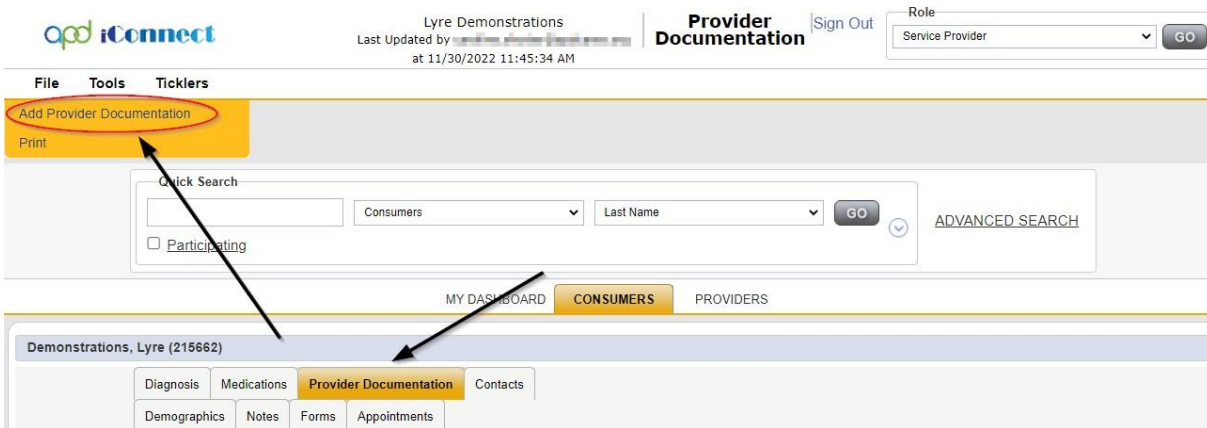
4. The Provider Documentation Details page is displayed. Update the following fields:

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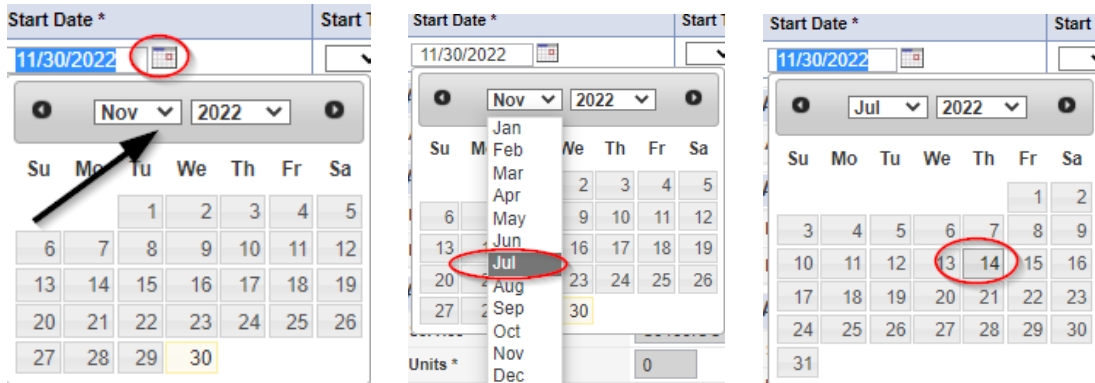
b. Start Time: Use the Dropdown Menus to make the selections. Select the Hour, the Minute, and AM/PM.

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.
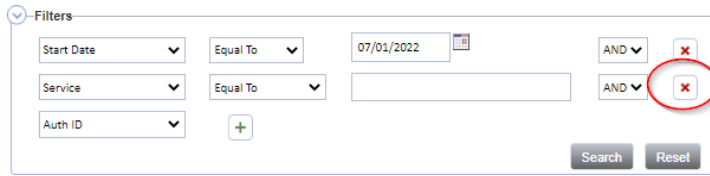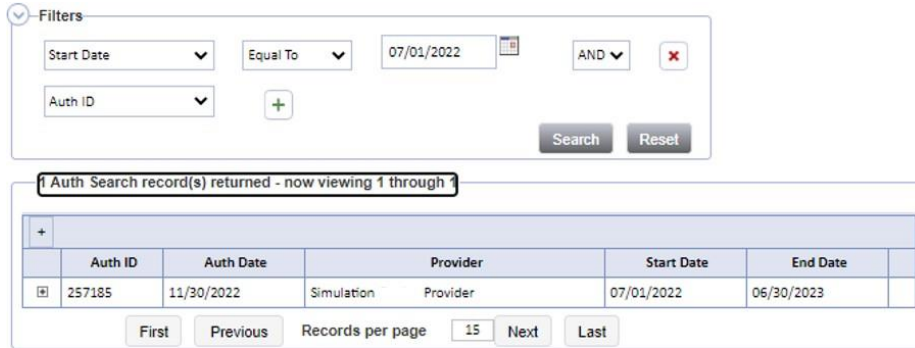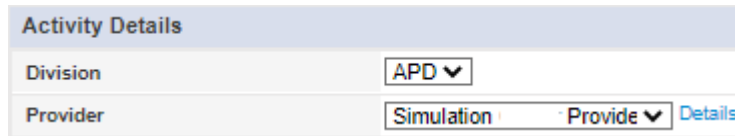

d. Use the Red X to remove filters.

e. Click the Search button.

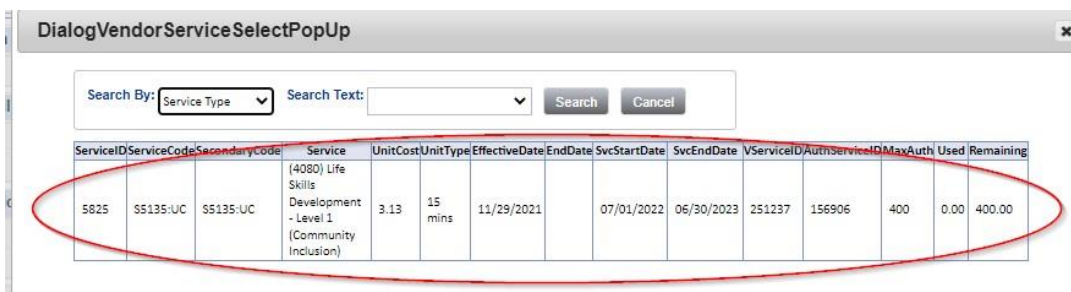6. Click the Authorization. The Authorization ID is populated on the Provider Documentation details page.

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

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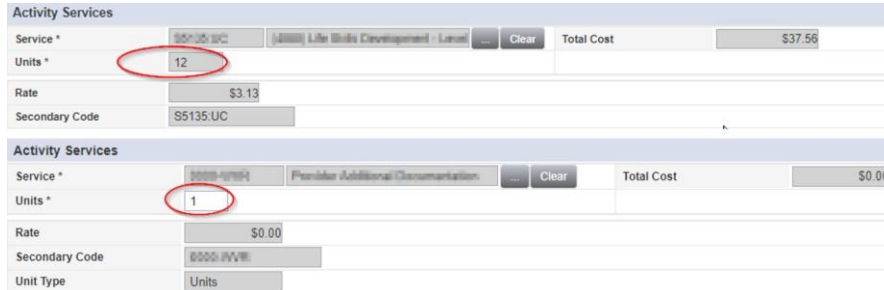

a. Select the Service.

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.
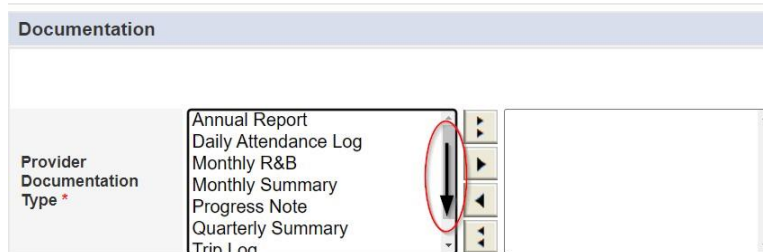

10. Provider Documentation Type = Select as needed.

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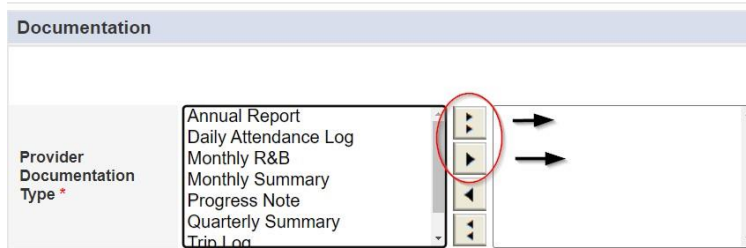
    b. The carat pointing to the right will move selections to the box on the right.
       i. Single carat moves the selected options.
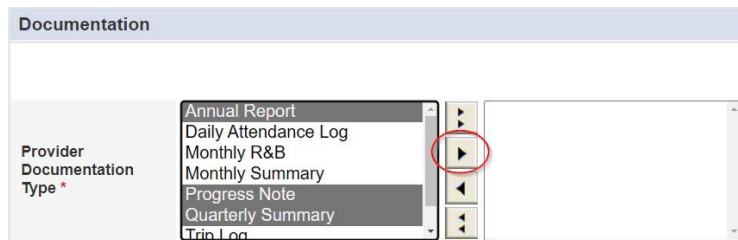   ii. Double carats move all the items.

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

    d. Selections should be moved to the box on the right.
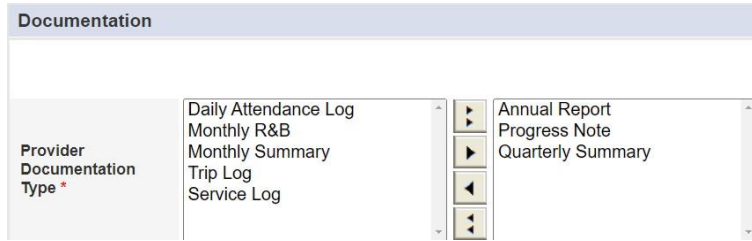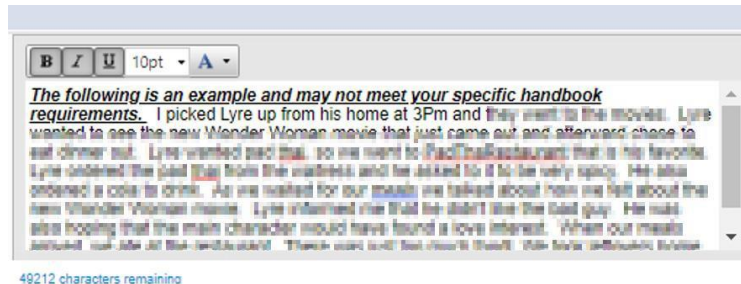
e. If incorrect selections were made, use the carat pointing to the left to move those selections back into the original menu on the left.

  i. Single carat moves the selected options.

  ii. Double carats move all the items.
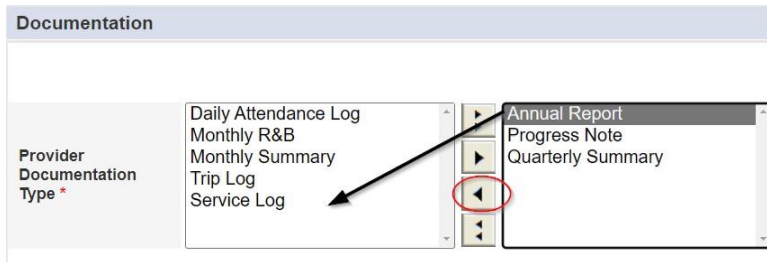
11. Note - Enter details of the services provided to the consumer by typing in the text box.

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.
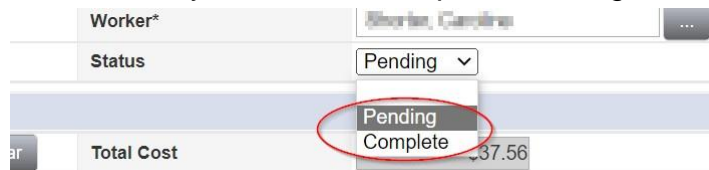
13. File > **Save and Close Provider Documentation.**

Daily Progress Note

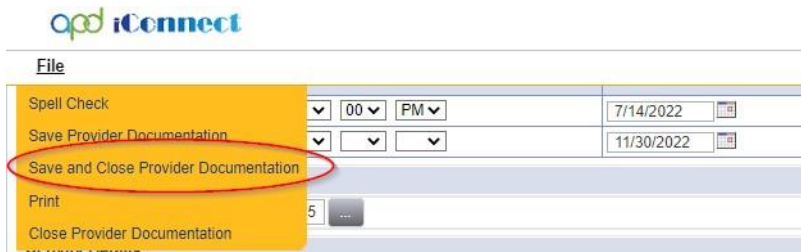Service Providers will document activities for the following services on the Provider Documentation tab in iConnect:

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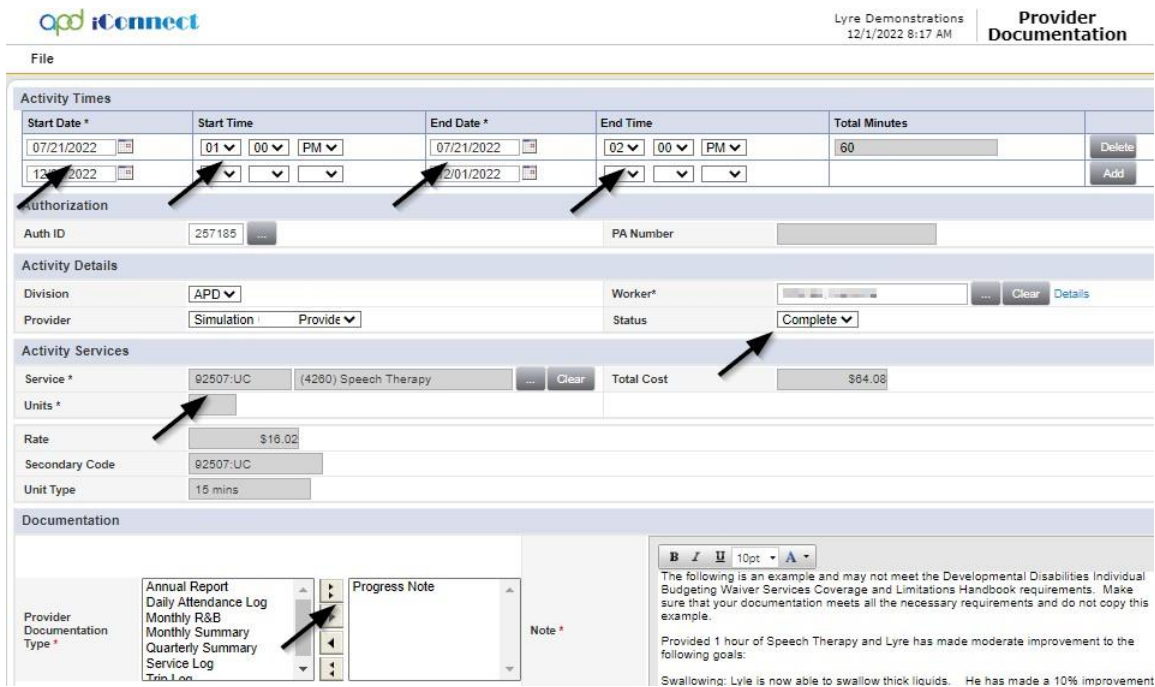
1. To begin, log into iConnect and set Role = **Service Provider** or **Service Provider Worker**. Click **Go.**

2. Navigate to the Consumer's record and click the **Provider Documentation** tab > click **File** > **Add Provider Documentation.**
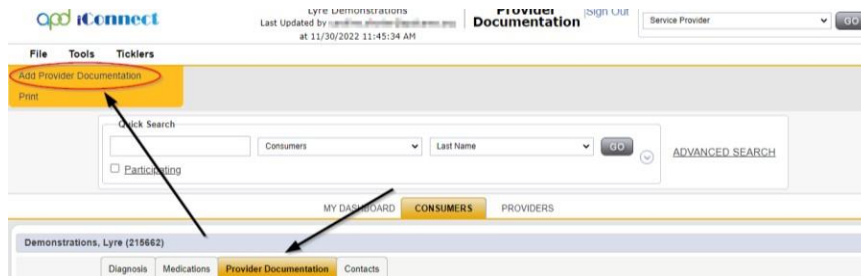
3. The Provider Documentation Details page is displayed. Update the following fields:
   a. Start Date: Select the Date of Service.
   b. Start Time: Select the start time of the service
   c. End Date: Select the Date of Service.
   d. End Time: Select the end time of the service
   e. Click **Add.**

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.
   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.
10. Status = Complete.

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. There are two options to enter the Monthly Summary:
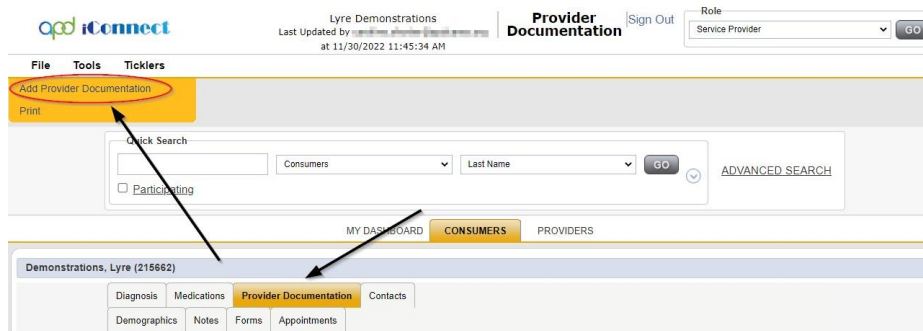
First Option: Include the Monthly Summary in the final Progress Note for the month.

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.

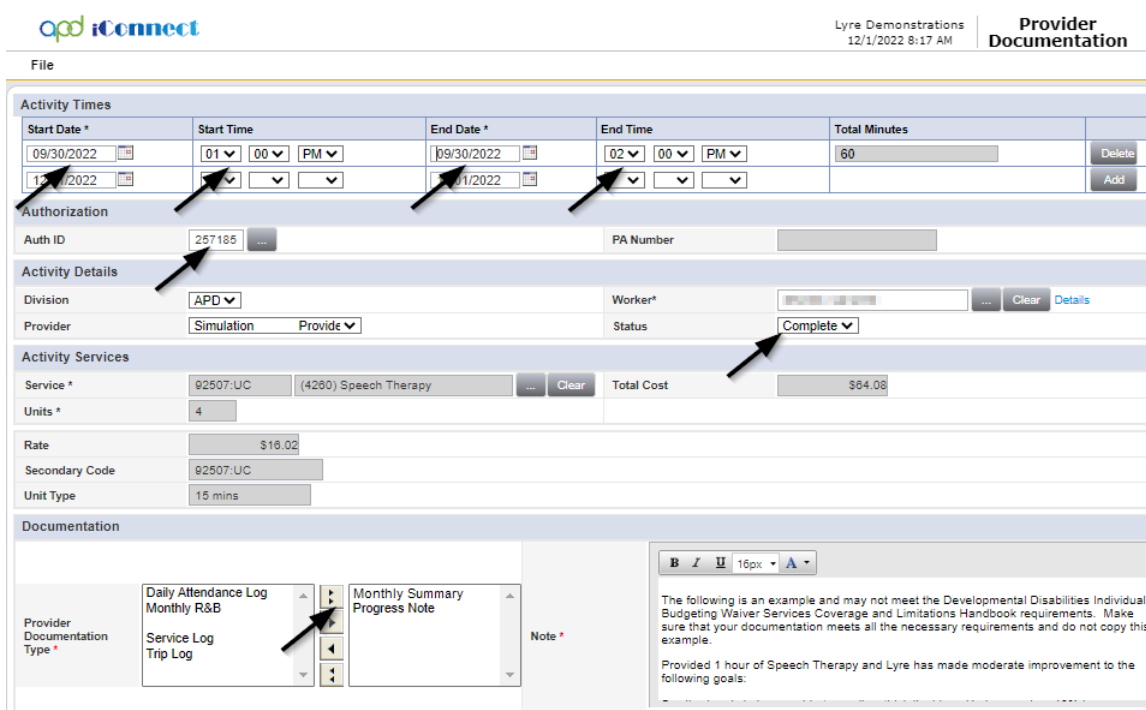Include the Monthly Summary in the final Progress Note for the Month:

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. 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.

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.
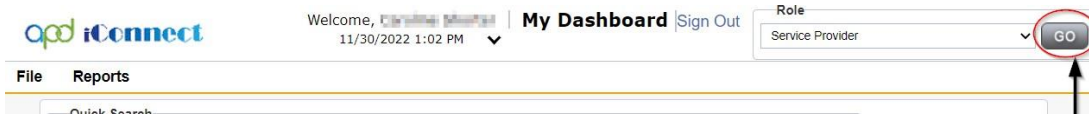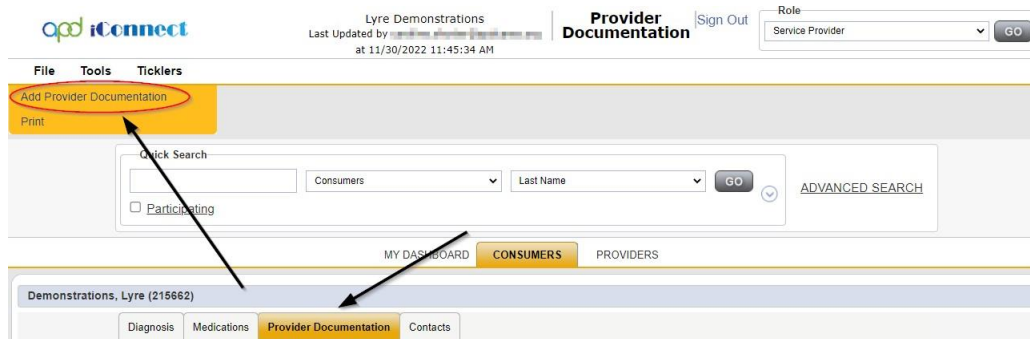
10. Status = Complete.

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

Add the Monthly 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.**
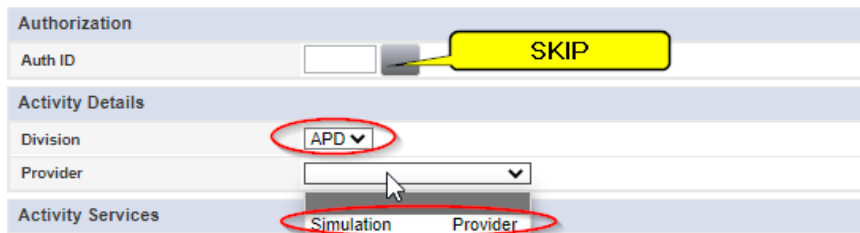

3. The Provider Documentation Details page is displayed. Update the following fields:
   a. Start Date: Select the Date of Service.
   b. Start Time: Select the start time of the service
   c. End Date: Select the Date of Service.
   d. End Time: Select the end time of the service
   e. Click **Add.**

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.

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 = 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

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. There are two options to enter the Quarterly Summary:
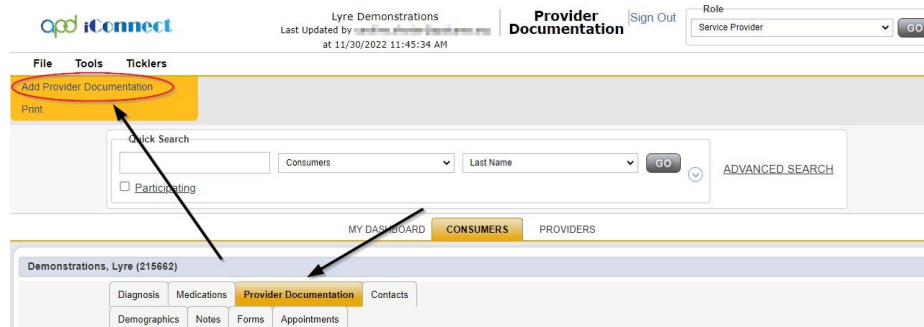
> **First Option:** Include the Quarterly Summary in the last Progress Note for the Quarter.
>
> **Second Option:** Add the Quarterly Summary as a separate activity using the 0000-WVR Code.

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

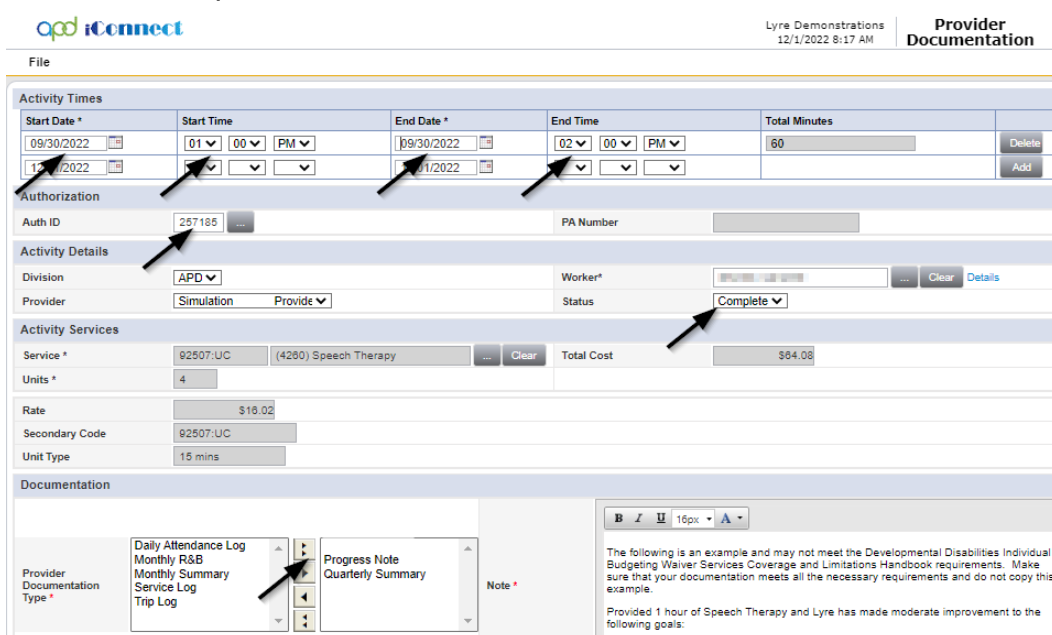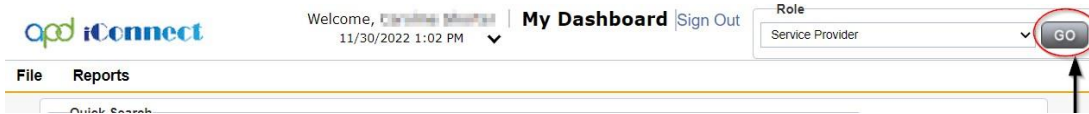Include the Quarterly Summary in the final Progress Note for the Quarter:

1. To begin, log into iConnect and set Role = **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. 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.

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.
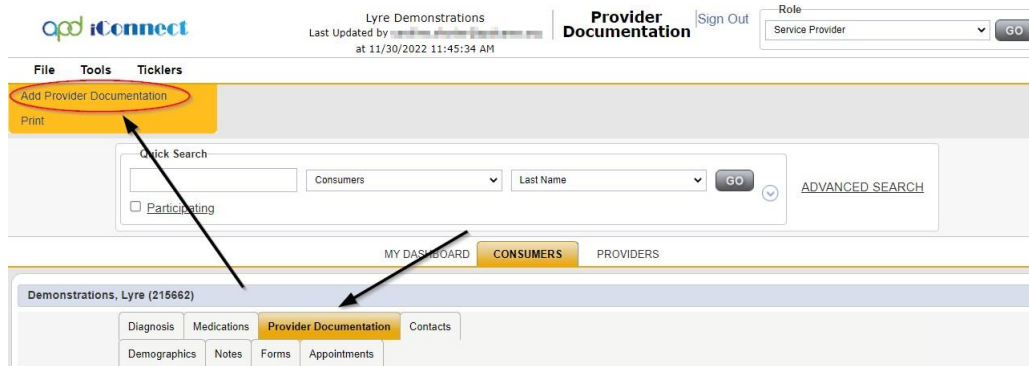
10. Status = Complete

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

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.**
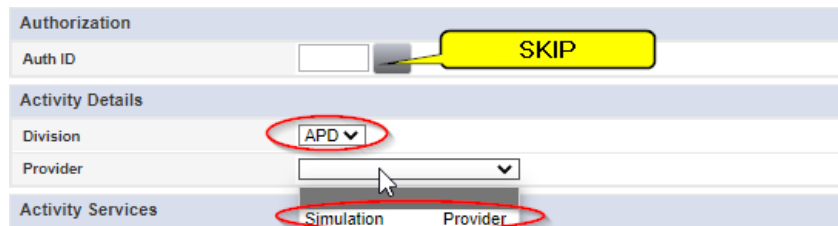

3. The Provider Documentation Details page is displayed. Update the following fields:

    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.

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.

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

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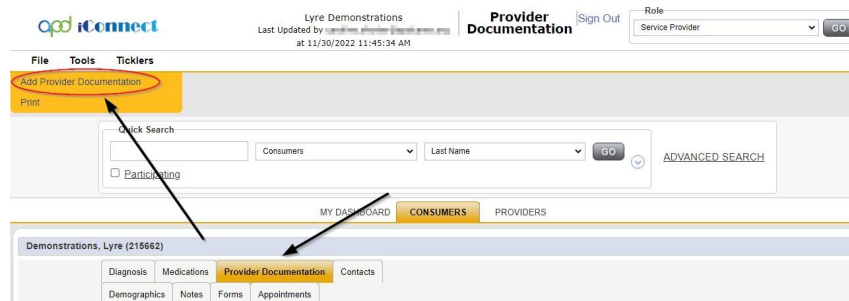
>**First Option:** Include the Annual Report in the last Progress Note for the year.

>**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.
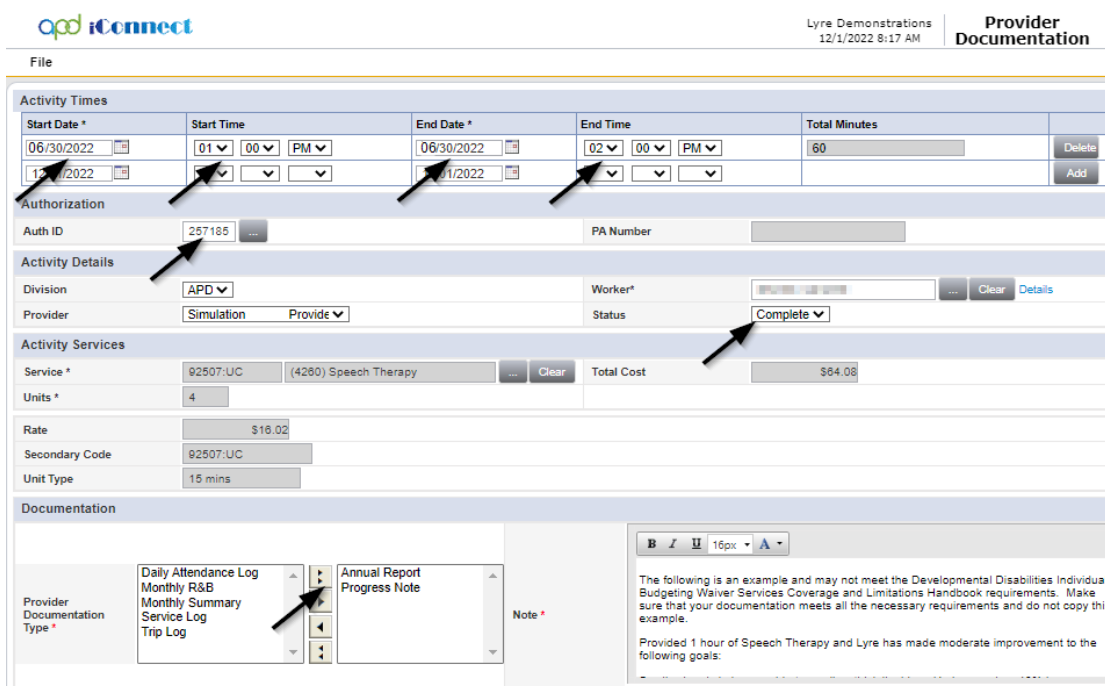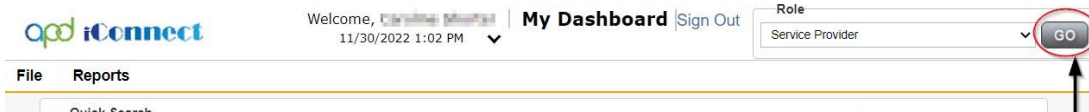
Include the Annual Report in the final Progress Note for the year:

1. To begin, log into iConnect and set Role = **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. 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.

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.
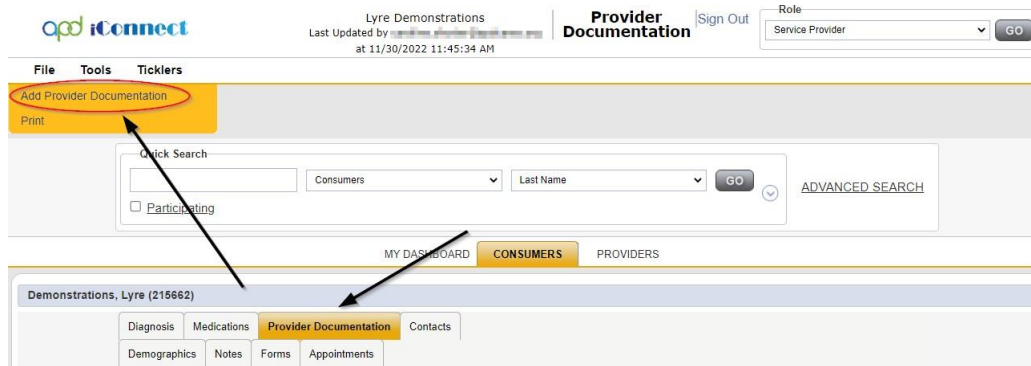
10. Status = Complete

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

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.**
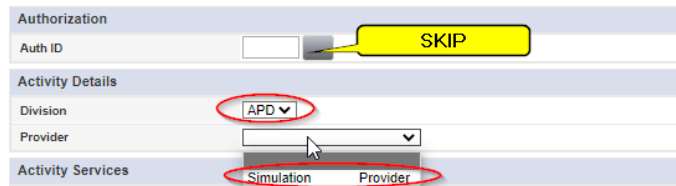

3. The Provider Documentation Details page is displayed. Update the following fields:
   a. Start Date: Select the Date of Service.
   b. Start Time: Select the start time of the service
   c. End Date: Select the Date of Service.
   d. End Time: Select the end time of the service
   e. Click **Add.**

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.

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.

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

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