Reviewing Provider Documentation in iConnect

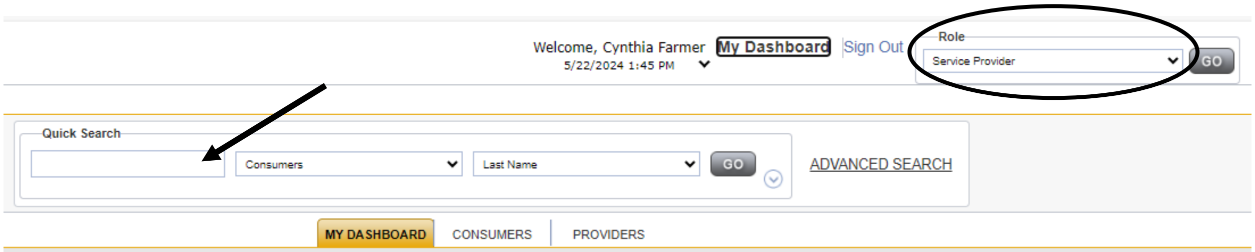
Introduction

Documentation required in accordance with Appendix A shall be entered into iConnect confirming that a service has been rendered. When a service is rendered, the provider must document the service and submit billing documentation in iConnect in accordance with Appendix A. **<u>It is imperative that Agency Owners and/or designated administrative staff review all documentation in iConnect for completeness and correctness prior to billing for services</u>**. This guide was created for stakeholders to understand the steps required in reviewing provider documentation records.

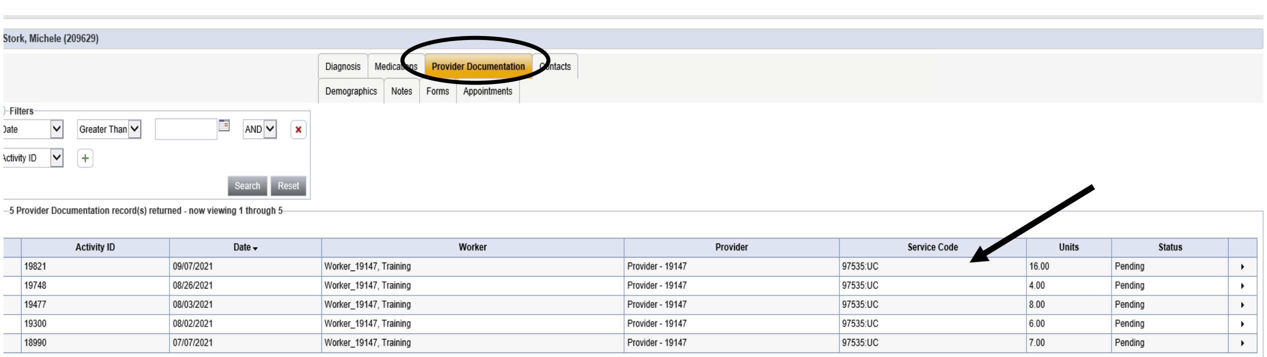
Reviewing Provider Documentation Records

Documentation should be reviewed by navigating to the Provider Documentation tab in the Consumer's record.

1. To review documentation, using the **Service Provider** role, from My Dashboard, navigate to the Consumer's record by completing a **Quick Search**.
   - Enter the Consumer's last name, ensure that the second field contains Consumers, and the third field contains Last Name and click **GO**.



2. From the Consumer's record, click on the **Provider Documentation** tab. A list of documentation records created by workers for dates of service will be displayed:



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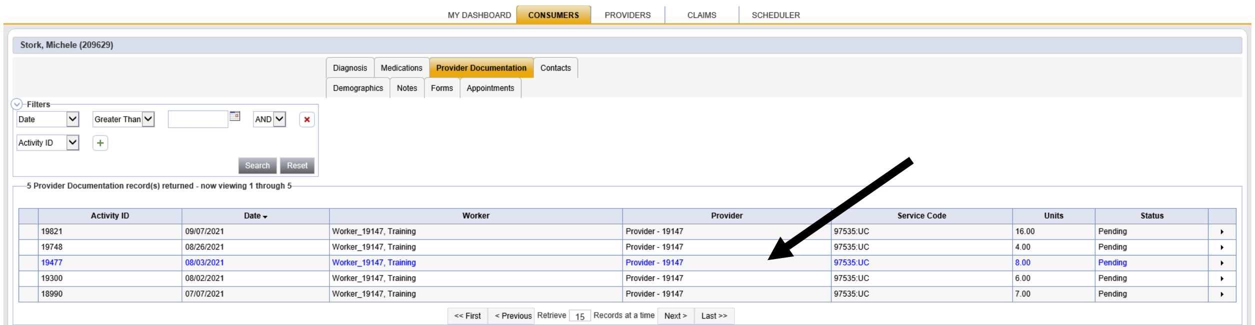
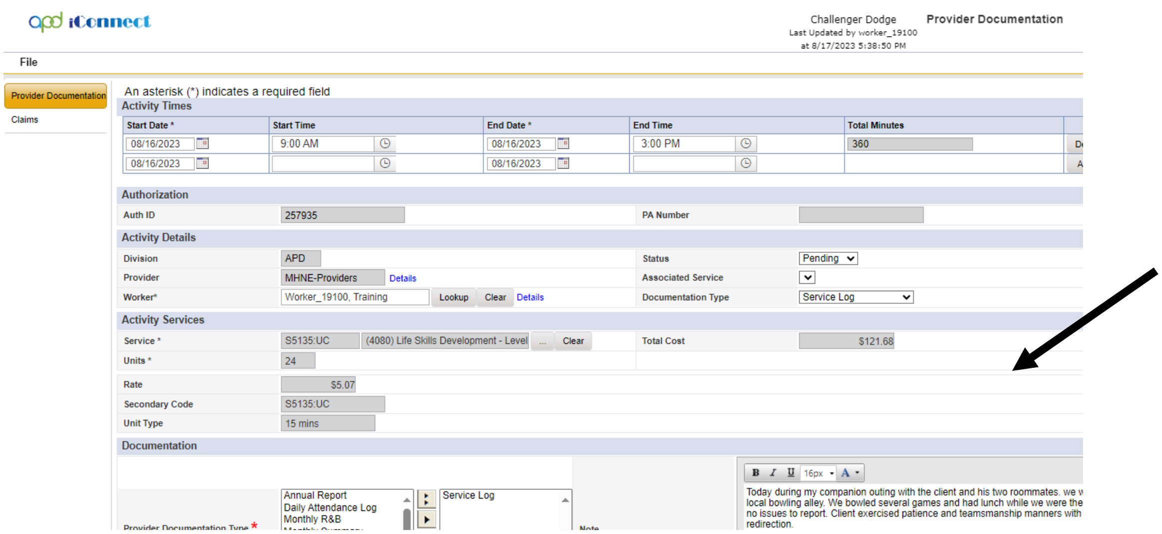
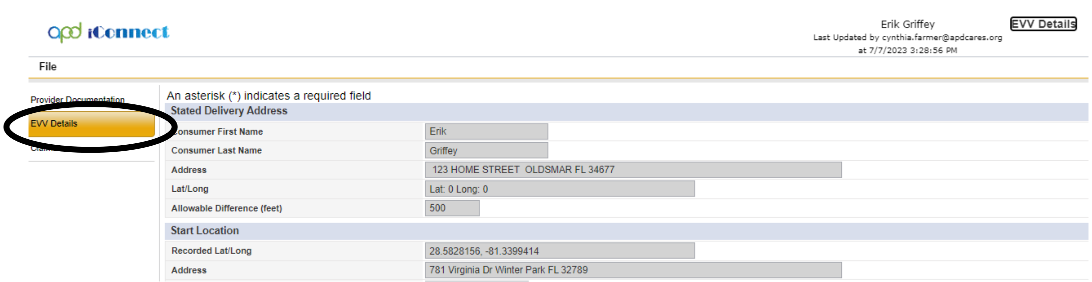
3. To open a provider documentation record, **click on the row for the record** to complete the review:



- Once the provider documentation record is open, the specifics of the documentation will be listed:



- If applicable, for Documentation that used Electronic Visit Verification (EVV), users will review a separate EVV Details tab located within the Provider Documentation Record. **Click on the EVV Details** tab, and users will be able to review the EVV documentation. Please see the [iConnect EVV eLearning Library]() for more information and job aids on EVV.



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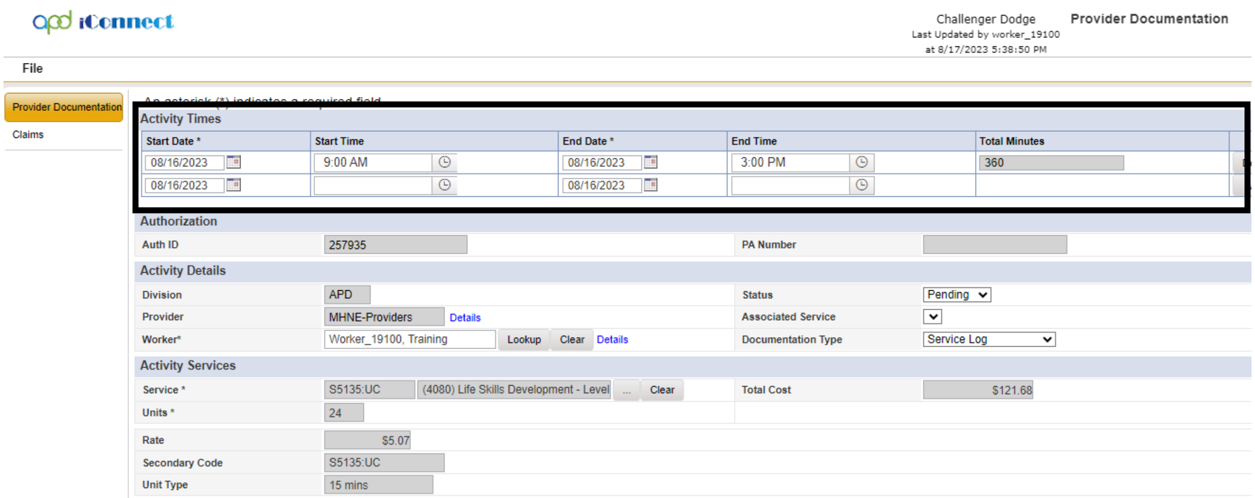
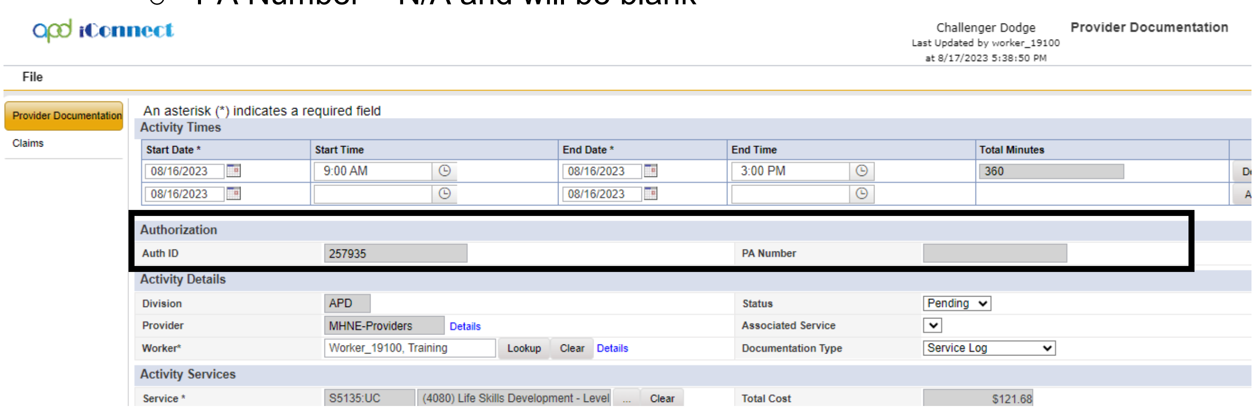
4. When reviewing documentation records, review and verify each line of the record to ensure accuracy and completeness.
   a. **Under Activity Times**:
   - First, review the Date and Time(s) of the service.
     - Remember, most services only allow **ONE DATE** per record (with the exception of LSD3/LSD4 and Res Hab).
     - These entries can be edited/adjusted by the Service Provider role, as needed.



   b. **Under Authorization**:
   - Auth ID = Review the Authorization (Auth) ID to ensure that the correct authorization has been included on the documentation.
     - If the Auth ID is incorrect, the documentation record will need to be deleted and recreated selecting the correct Auth ID number.
     - PA Number = N/A and will be blank



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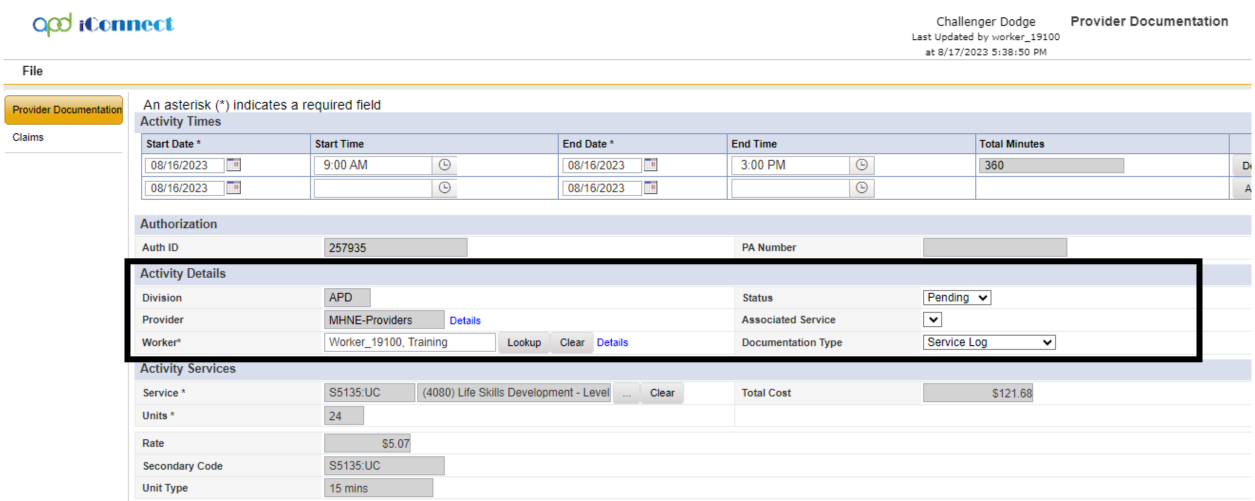
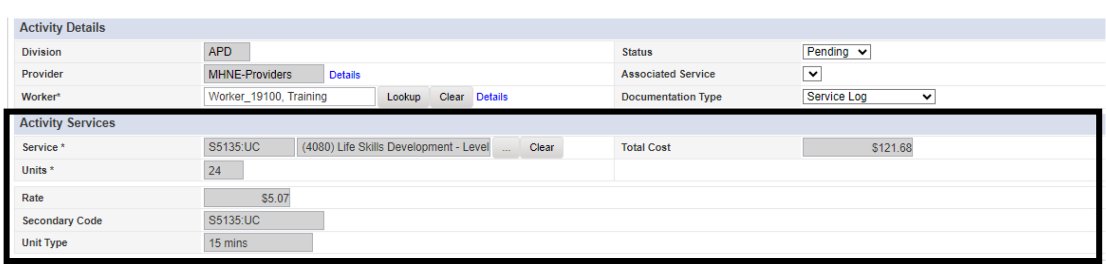
c. **Under Activity Details**:
- Division = APD
- Provider = Provider Agency Name
- Worker = Direct Care Worker's Name
- Status = Pending and will need to be updated to Complete upon final review
- Associated Service = Choose the appropriate service
- Documentation Type = Choose the appropriate documentation type (Please refer to the iBudget Handbook for specifics and always follow established workflows in manuals and job aids).



d. **Under Activity Services**:
- Service = Service Type
- Units = Number of Units provided
- Rate = Rate established per Service Code
- Secondary Code = Service Code
- Unit Type = Unit Type (includes minutes if applicable)
- Total Cost = Auto-calculates based on the services provided in the first line under Activity Date and Times



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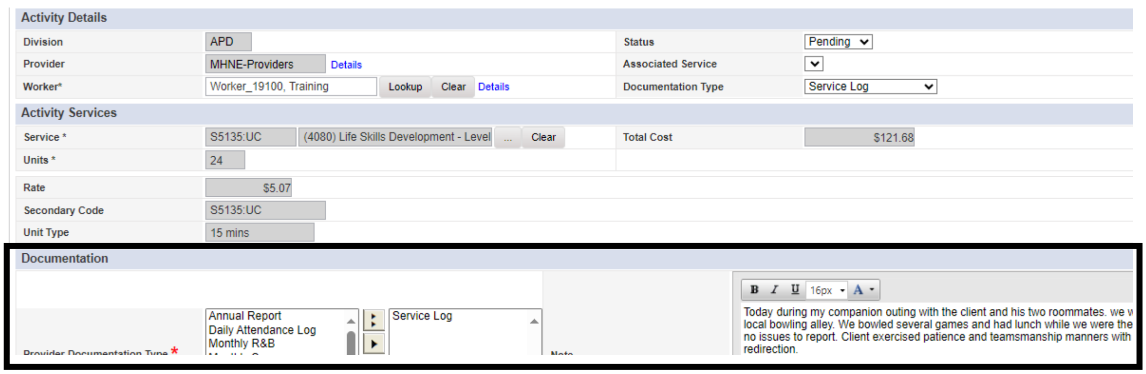
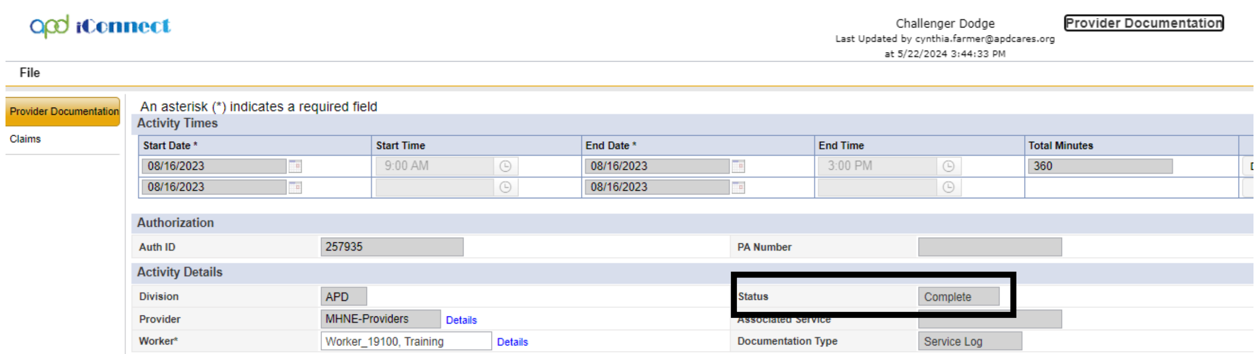
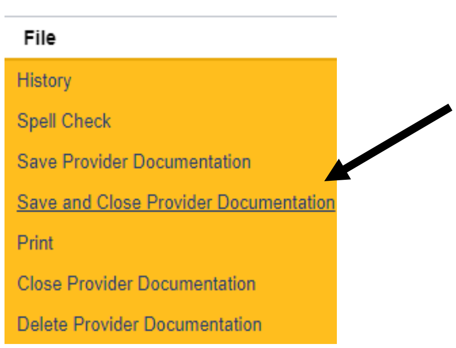
e. **<u>Under Documentation</u>**:
- Provider Documentation Type = Established type (Service Log/Progress Note/ Daily Attendance Log/Trip Log – refer to the iBudget Handbook)
- Note = Service Delivery Notes listed per iBudget Handbook Requirements



5. Once the documentation record has been reviewed for accuracy, place the record in a **Complete** status which will make it unable to be edited:



6. Click **File > Save and Close Provider Documentation** to save any edits/ changes made to the documentation record.



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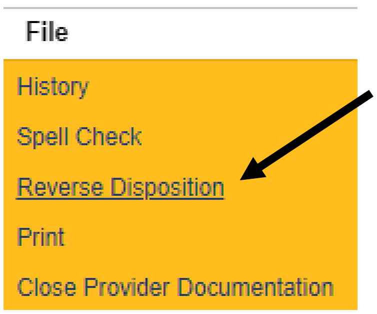
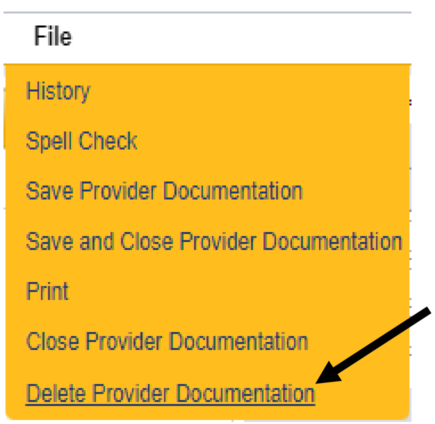
If the record was placed in a Complete status and additional edits need to be made to the documentation, the Service Provider role can Reverse the Status Disposition to place the record back in a Pending status to make edits by clicking **File > Reverse Disposition**:



After additional edits have been completed, remember to **change the status back to Complete** and then click **File > Save and Close Provider Documentation**.

The Service Provider role also has the capability to Delete the Provider Documentation from the **File** menu by clicking **Delete Provider Documentation**:



***There is not an option to undelete. Once deleted the record will no longer exist.**

Please refer to the [Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook] for specific documentation requirements.

Additional materials and resources are also located on the iConnect eLearning Library at: [iConnect | Waiver (myflorida.com)].

Please contact your Regional Trainer if you have questions.