

Reviewing Provider Documentation in iConnect

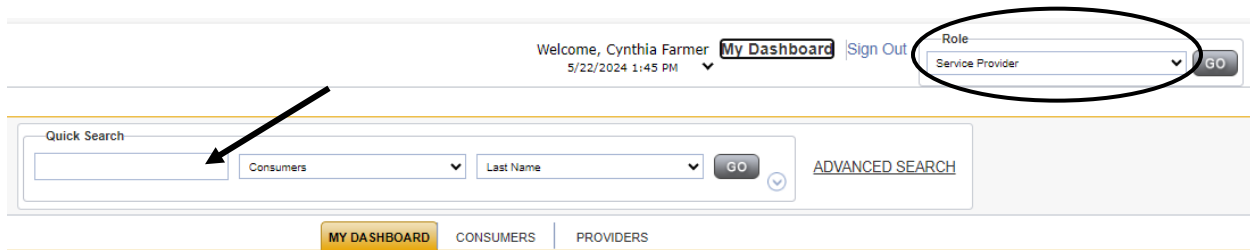
Introduction

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. **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.** 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.

- 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**.

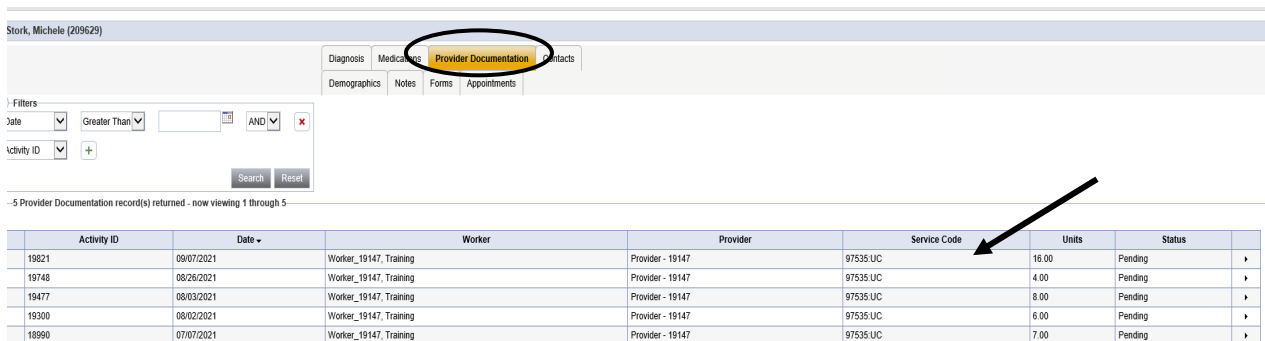


Welcome, Cynthia Farmer 5/22/2024 1:45 PM **My Dashboard** Sign Out Role: Service Provider GO

Quick Search: Consumers Last Name GO ADVANCED SEARCH

MY DASHBOARD CONSUMERS PROVIDERS

- 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:



Stork, Michele (209629)

Diagnosis Medication **Provider Documentation** Contacts
Demographics Notes Forms Appointments

Filters: Date Greater Than AND x
Activity ID +

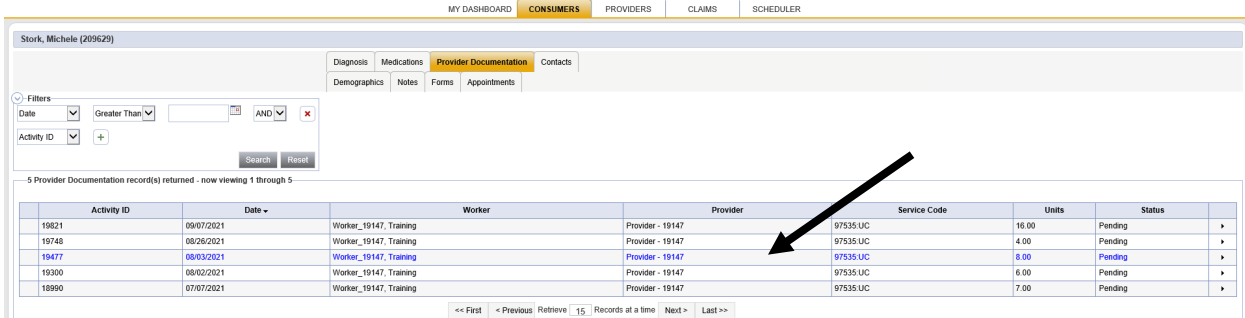
Search Reset

5 Provider Documentation record(s) returned - now viewing 1 through 5

Activity ID	Date	Worker	Provider	Service Code	Units	Status
19821	09/07/2021	Worker_19147, Training	Provider - 19147	97535 UC	16.00	Pending
19748	08/26/2021	Worker_19147, Training	Provider - 19147	97535 UC	4.00	Pending
19477	08/03/2021	Worker_19147, Training	Provider - 19147	97535 UC	8.00	Pending
19300	08/02/2021	Worker_19147, Training	Provider - 19147	97535 UC	6.00	Pending
18990	07/07/2021	Worker_19147, Training	Provider - 19147	97535 UC	7.00	Pending

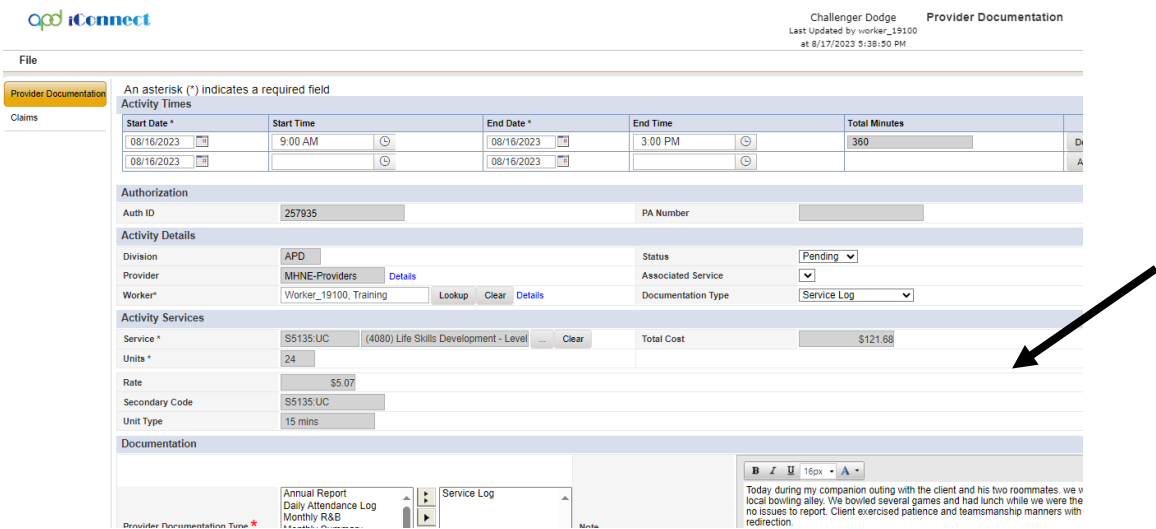
Reviewing Provider Documentation in iConnect

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



Activity ID	Date	Worker	Provider	Service Code	Units	Status
18821	08/07/2021	Worker_19147_Training	Provider - 19147	97535.UC	10.00	Pending
19748	08/26/2021	Worker_19147_Training	Provider - 19147	97535.UC	4.00	Pending
19477	08/03/2021	Worker_19147_Training	Provider - 19147	97535.UC	8.00	Pending
19300	08/02/2021	Worker_19147_Training	Provider - 19147	97535.UC	6.00	Pending
18990	07/07/2021	Worker_19147_Training	Provider - 19147	97535.UC	7.00	Pending

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



Challenger Dodge Provider Documentation
Last Updated by worker_19100 at 8/17/2023 3:38:50 PM

File

Provider Documentation

An asterisk (*) indicates a required field

Activity Times

Start Date *	Start Time	End Date *	End Time	Total Minutes
08/16/2023	9:00 AM	08/16/2023	3:00 PM	360
08/16/2023		08/16/2023		

Authorization

Auth ID: 257935 PA Number: [Redacted]

Activity Details

Division: APD Status: Pending

Provider: MHNE-Providers Associated Service: [Redacted]

Worker: Worker_19100_Training Documentation Type: Service Log

Activity Services

Service *: S5135.UC (4080) Life Skills Development - Level ... Clear Total Cost: \$121.68

Units *: 24

Rate: \$5.07

Secondary Code: S5135.UC

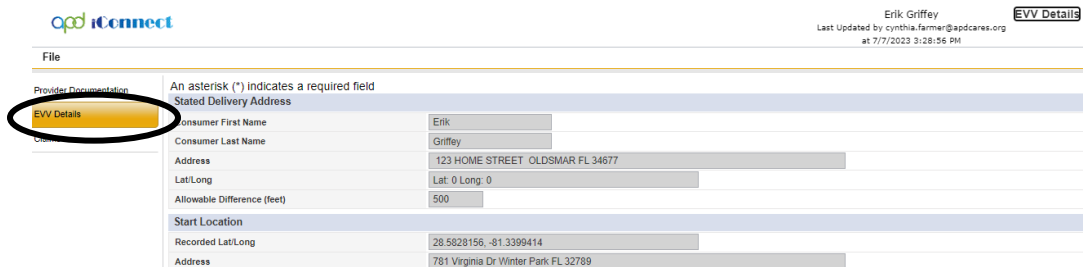
Unit Type: 15 mins

Documentation

Provider Documentation Type: * [Redacted]

Documentation: [Text Area with content: "Today during my companion outing with the client and his two roommates, we v local bowling alley. We bowled several games and had lunch while we were the no issues to report. Client exercises patience and teammanship manners with redirection."] [Rich Text Editor]

- 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.



Erik Griffey EVV Details
Last Updated by cynthia.farmer@apdcares.org at 7/7/2023 3:28:56 PM

File

Provider Documentation

An asterisk (*) indicates a required field

EVV Details

Stated Delivery Address

Consumer First Name: Erik
Consumer Last Name: Griffey
Address: 123 HOME STREET OLDSMAR FL 34677
Lat/Long: Lat: 0 Long: 0
Allowable Difference (feet): 500

Start Location

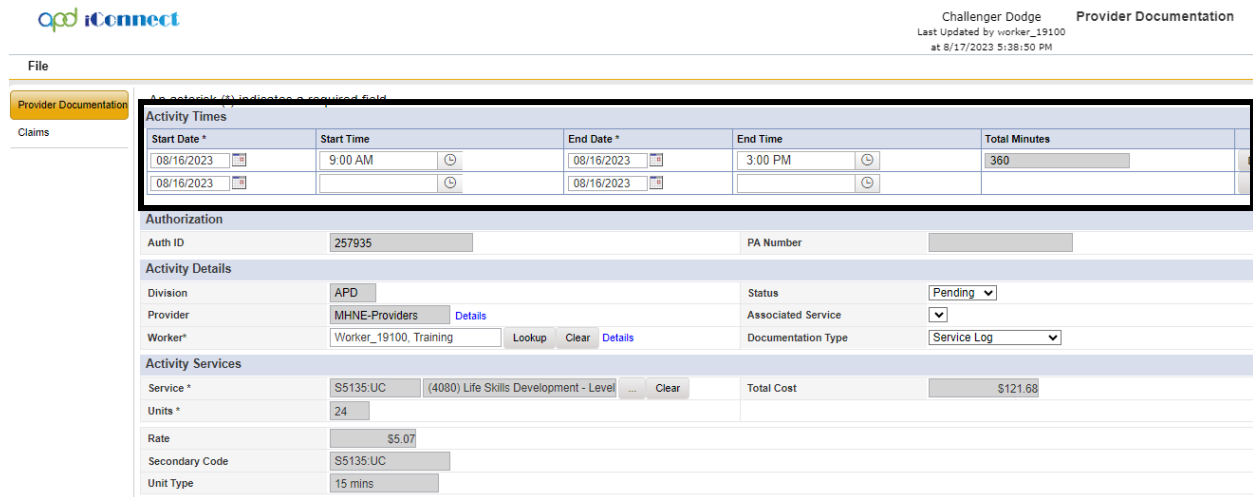
Recorded Lat/Long: 28.5828156, -81.3399414
Address: 781 Virginia Dr Winter Park FL 32789

Reviewing Provider Documentation in iConnect

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.
 - o Remember, most services only allow **ONE DATE** per record (with the exception of LSD3/LSD4 and Res Hab).
 - o These entries can be edited/adjusted by the Service Provider role, as needed.



Challenger Dodge Provider Documentation
Last Updated by worker_19100 at 8/17/2023 5:38:50 PM

File

Provider Documentation

Claims

An asterisk (*) indicates a required field

Start Date *	Start Time	End Date *	End Time	Total Minutes
08/16/2023	9:00 AM	08/16/2023	3:00 PM	360
08/16/2023		08/16/2023		

Authorization

Auth ID: 257935 PA Number: [Blank]

Activity Details

Division: APD Status: Pending

Provider: MHNE-Providers Associated Service: [Blank]

Worker*: Worker_19100, Training Documentation Type: Service Log

Activity Services

Service*: S5135.UC (4080) Life Skills Development - Level Total Cost: \$121.68

Units*: 24

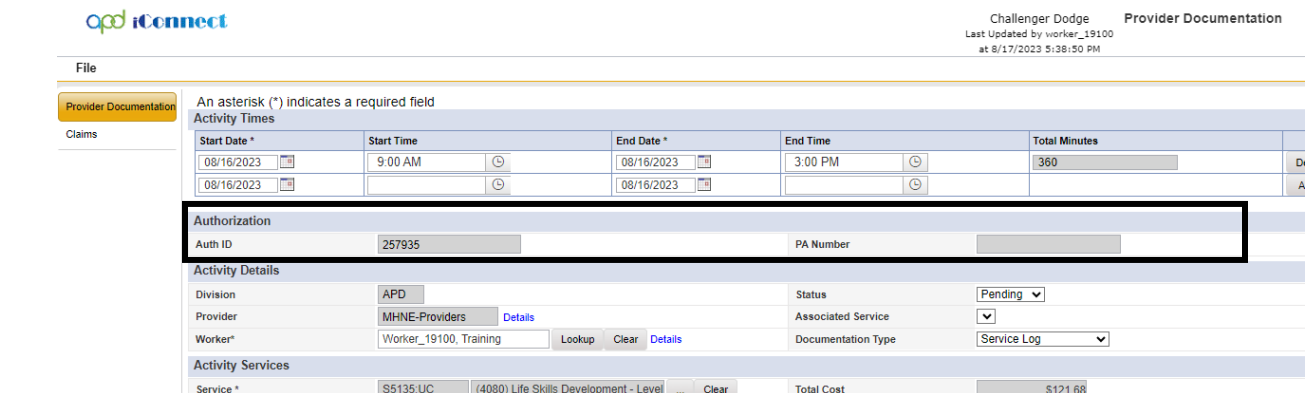
Rate: \$5.07

Secondary Code: S5135.UC

Unit Type: 15 mins

b. **Under Authorization:**

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



Challenger Dodge Provider Documentation
Last Updated by worker_19100 at 8/17/2023 5:38:50 PM

File

Provider Documentation

Claims

An asterisk (*) indicates a required field

Start Date *	Start Time	End Date *	End Time	Total Minutes
08/16/2023	9:00 AM	08/16/2023	3:00 PM	360
08/16/2023		08/16/2023		

Authorization

Auth ID: 257935 PA Number: [Blank]

Activity Details

Division: APD Status: Pending

Provider: MHNE-Providers Associated Service: [Blank]

Worker*: Worker_19100, Training Documentation Type: Service Log

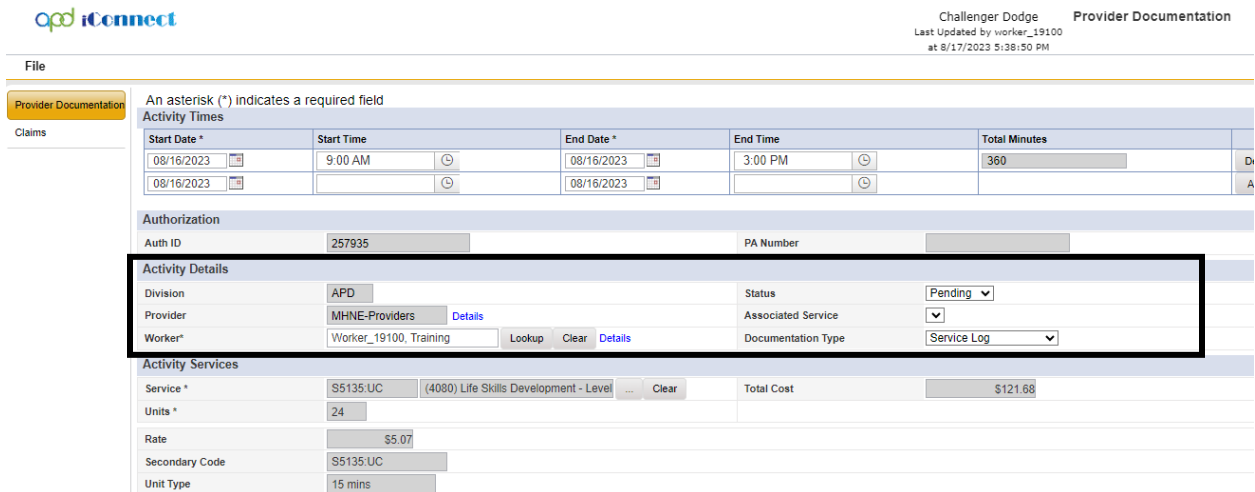
Activity Services

Service*: S5135.UC (4080) Life Skills Development - Level Total Cost: \$121.68

Reviewing Provider Documentation in iConnect

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).

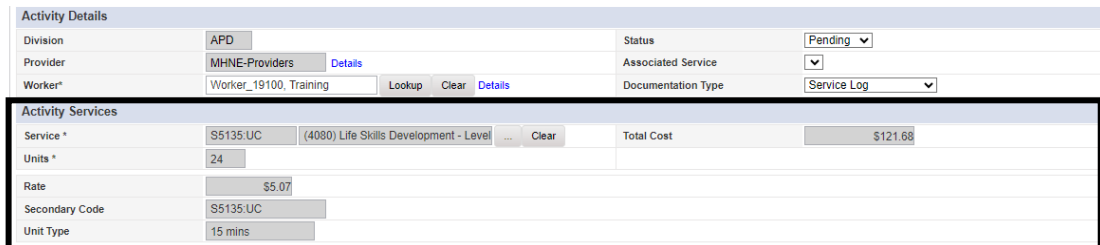


The screenshot shows the iConnect interface for Provider Documentation. The top right corner displays 'Challenger Dodge Provider Documentation' and 'Last Updated by worker_19100 at 8/17/2023 5:38:50 PM'. The main form area includes sections for 'Activity Times', 'Authorization', 'Activity Details', and 'Activity Services'. The 'Activity Details' section is highlighted with a black box and contains the following information:

Division	APD	Status	Pending
Provider	MHNE-Providers	Associated Service	
Worker*	Worker_19100, Training	Documentation Type	Service Log

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



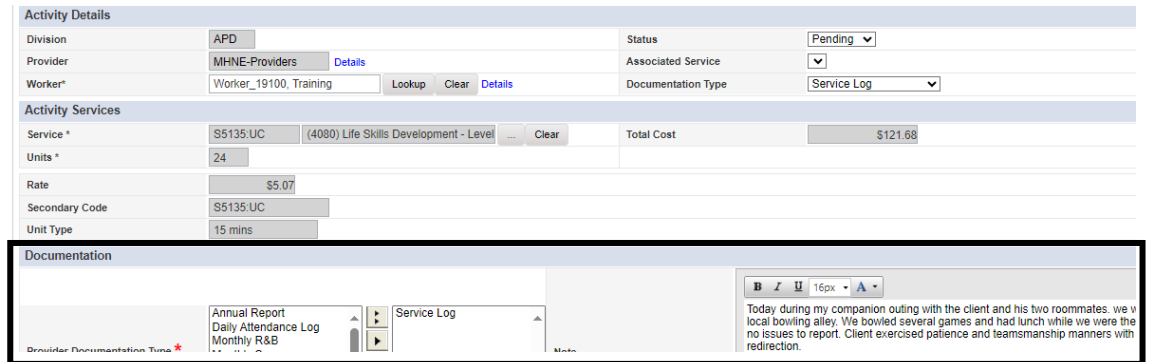
The screenshot shows the 'Activity Services' section of the iConnect form, highlighted with a black box. It contains the following information:

Service *	S5135:UC (4080) Life Skills Development - Level	Total Cost	\$121.68
Units *	24		
Rate	\$5.07		
Secondary Code	S5135:UC		
Unit Type	15 mins		

Reviewing Provider Documentation in iConnect

e. Under Documentation:

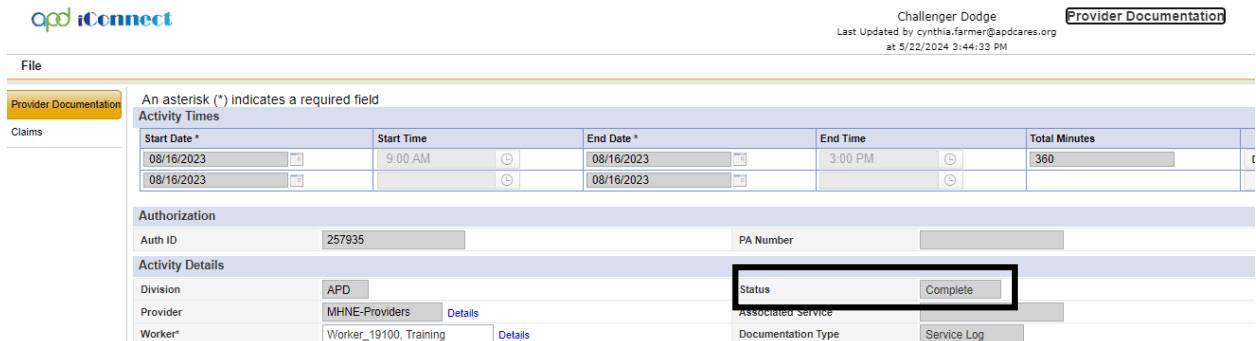
- Provider Documentation Type = Established type (Service Log/Progress Note/ Daily Attendance Log/Trip Log – refer to the iBudget Handbook)
- Note = Service Delivery Notes listed per iBudget Handbook Requirements



The screenshot shows a form with three main sections:

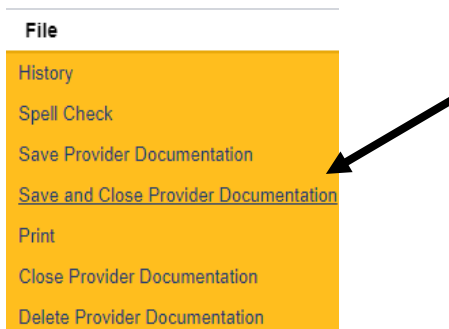
- Activity Details:** Includes fields for Division (APD), Provider (MHNE-Providers), Worker* (Worker_19100, Training), Status (Pending), Associated Service, and Documentation Type (Service Log).
- Activity Services:** Includes Service* (S5135.UC), Units* (24), Rate (\$5.07), Secondary Code (S5135.UC), and Unit Type (15 mins). Total Cost is \$121.68.
- Documentation:** A text area with a rich text editor toolbar. The text reads: "Today during my companion outing with the client and his two roommates, we v local bowling alley. We bowled several games and had lunch while we were the no issues to report. Client exercised patience and teammanship manners with redirection."

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:



The screenshot shows the iConnect interface with the 'Provider Documentation' form open. The status is set to 'Complete'. The interface includes a 'File' menu, a 'Provider Documentation' sidebar, and a main form area with sections for 'Activity Times', 'Authorization', and 'Activity Details'. The 'Activity Times' table shows two entries for 08/16/2023. The 'Activity Details' section shows the same information as the previous screenshot, but with the status set to 'Complete'.

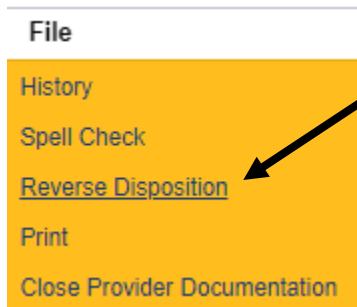
6. Click **File > Save and Close Provider Documentation** to save any edits/ changes made to the documentation record.



The screenshot shows the 'File' menu with the following options: History, Spell Check, Save Provider Documentation, Save and Close Provider Documentation, Print, Close Provider Documentation, and Delete Provider Documentation. An arrow points to the 'Save and Close Provider Documentation' option.

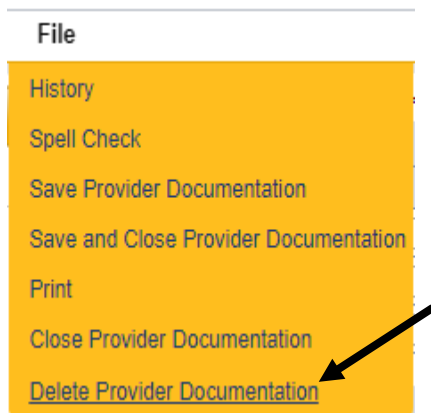
Reviewing Provider Documentation in iConnect

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.