# Service Provider Documentation Report

## Introduction

The Service Provider Documentation Report is designed for the Service Provider and the Service Provider Worker roles. The Service Provider role is assigned to Agency Owners and Qualified Organization (QO) Owners. Agency Owners and QO Owners are also able to assign the Service Provider role to qualified employees for management purposes using their ID PASS account. For further instructions on how to set up roles in iConnect, please refer to the Step-by-Step - ID PASS.

**NEW! Roles with Access to Pull the Service Provider Documentation Report:**
APD Main
Region QA Workstream Worker
Region QA Workstream Lead
Region Waiver Workstream Worker
Region Waiver Workstream Lead
ROM/Deputy ROM
Service Provider
Service Provider Worker
State Office Worker
Tier 1 Help Desk
Tier 2 Help Desk

It is important to distinguish what the different roles can retrieve within the report.

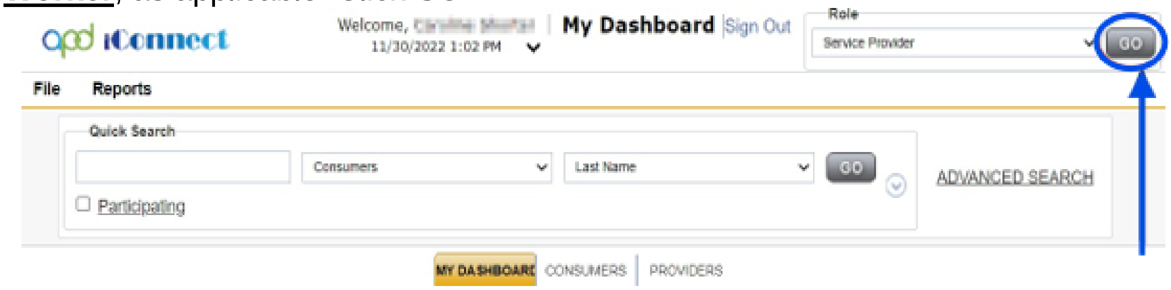
- The Service Provider role has access to pull a report to view the Provider Documentation submitted by all the workers of their Agency/QO and for all clients that have an authorization with that Agency/QO. The Service Provider Worker role will only have access to pull a report to view the Provider Documentation that they have submitted.
- NEW! APD roles will have access to pull a report with all provider documentation entered in iConnect for all providers.

***REMINDER:*** *Personal Health Information (PHI) will be pulled when exporting the Service Provider Documentation Report. It is the responsibility of all iConnect users to ensure that their systems follow all HIPAA requirements.*

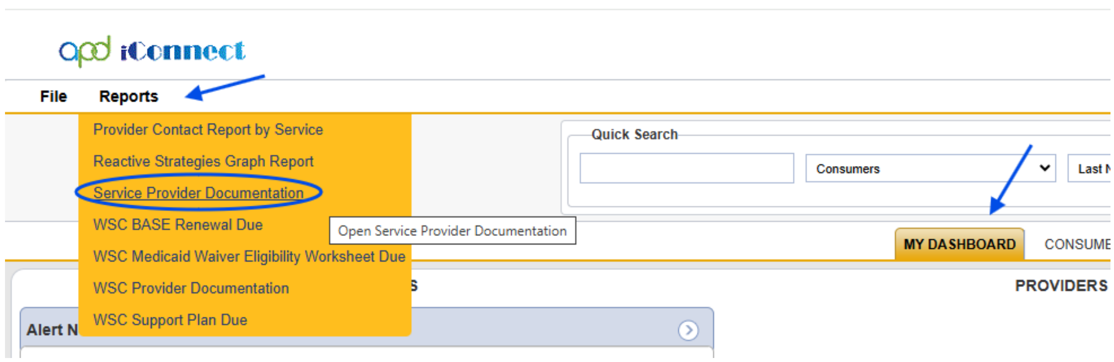
Please refer to the Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook for specific documentation requirements.

## Pulling the Provider Documentation Report

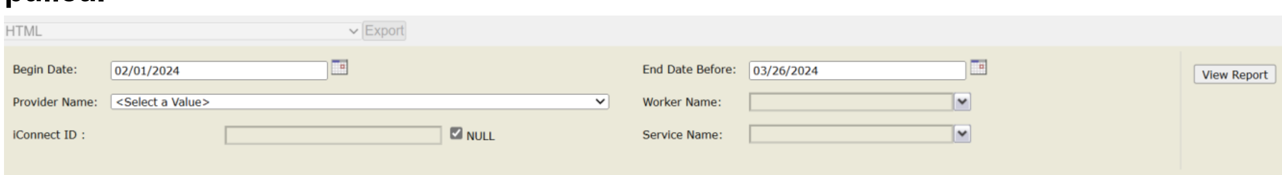
1. To begin, log into iConnect and set Role = **<u>Service Provider</u>** or **<u>Service Provider Worker</u>**, as applicable. Click **Go**.




2. On **My Dashboard**, navigate to the **Reports** menu and select **Service Provider Documentation.**




3. Fill out the search screen with the information needed for the report. **It is crucial that the information is filled out in a specific order to allow the report to be pulled.**

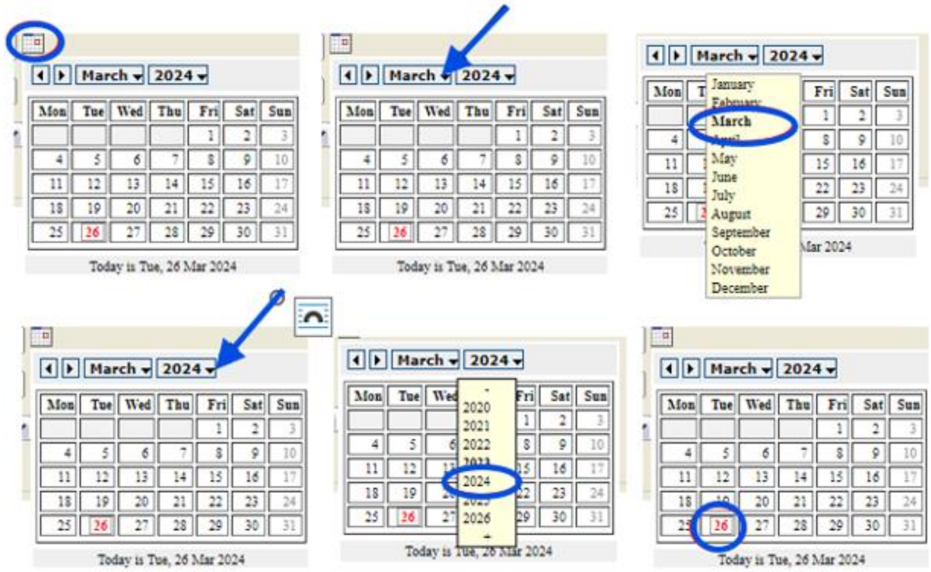



   a. Begin Date: Use the start date of the report criteria needed. A date must be selected by clicking on the appropriate date located in the calendar icon. Select the month and year by clicking on the corresponding drop-down menus, and then select the date by clicking on it.

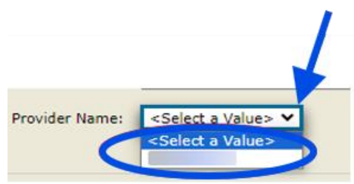
   b. UPDATED! End Date Before: Use the end date of the report criteria needed. A date must be selected by clicking on the appropriate date located in the calendar icon. Select the month and year by clicking on the corresponding drop-down menus, and then select the date by clicking on it.

   *The selected date parameters default to midnight. When choosing an end date (e.g., 01/31/2025), services running past 12:00:00 AM will not be included in the report. Therefore, to retrieve services provided on*

*01/31/2025, select 'End Date Before' as 02/01/2025.*



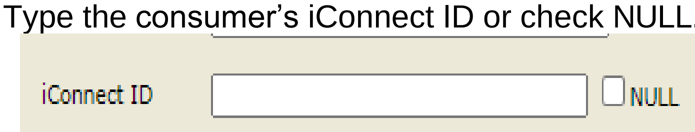
c. Provider Name: Choose the name of the Agency or QO in the drop-down menu.



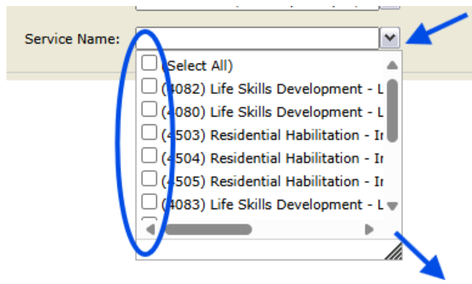

d. Worker Name: Click the checkbox next to the worker's name(s) needed displayed on the report.

***Note: Service Provider role will have access to all workers employed with their organization whereas the Service Provider Worker role will only have access to their own worker record. APD roles will have access to all workers in the selected Provider Name.***

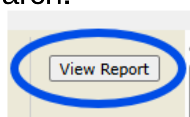

e. iConnect ID: Type the consumer's iConnect ID or check NULL.



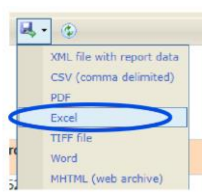
f. NEW! Service Name: Click the checkbox next to the service(s) or "Select All".
   - To expand the box to view additional providers, click and drag the bottom right corner of the dropdown menu. The search perimeters selected earlier will impact is accessible.



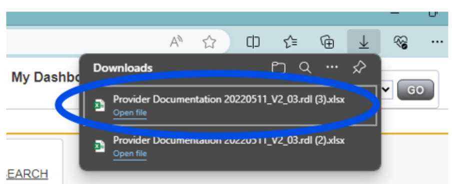

4. Click **View Report** to execute the search.



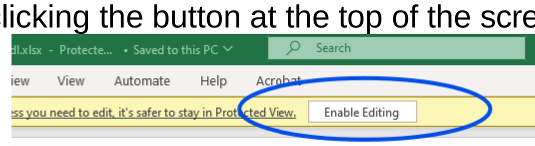

5. A report will be generated on the screen. View the report in this window or export the report.
   a. To export the report, go to the caret next to the Save icon.  Select **Excel**.




   b. The Excel report will download. Click the report from the computer's downloads.




   c. **Enable Editing** by clicking the button at the top of the screen.




6. Review/filter report as needed. Utilize the [How to Add Filters to iConnect Reports Job Aid]() for additional assistance in filtering an iConnect report.