

## 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.

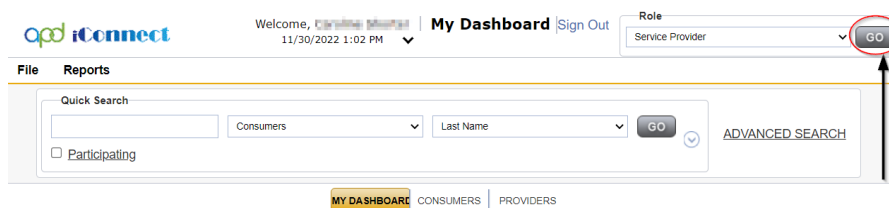
This job aid will encompass using iConnect to record services using the Provider Documentation Tab of the Consumer's record. If services are required to use the EVV system, this aid will not address those tasks, please refer to the [EVV Information and Training Material](#) website.

**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

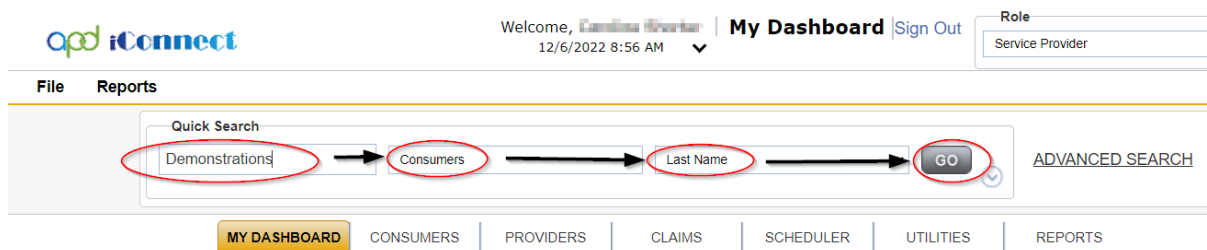
1. To begin, log into iConnect and set Role = Service Provider or Service Provider Worker. Click **Go**.



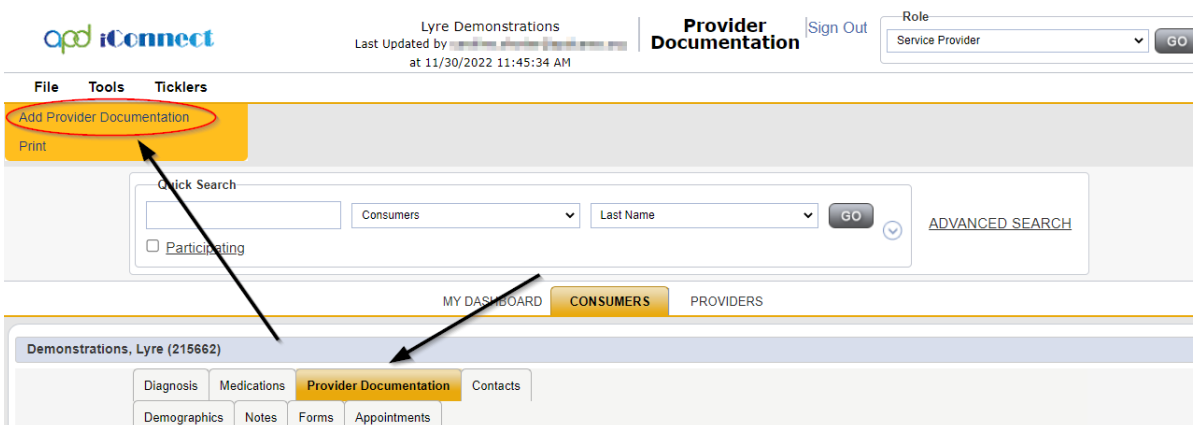
The screenshot shows the iConnect dashboard. At the top, there is a navigation bar with the iConnect logo, a welcome message, a date/time display, and links for 'My Dashboard' and 'Sign Out'. Below this is a 'Role' dropdown menu currently set to 'Service Provider', with a 'GO' button next to it. A red circle highlights the 'GO' button, and a black arrow points to it from below. Below the navigation bar is a 'File Reports' section with a 'Quick Search' area containing input fields for 'Consumers' and 'Last Name', a 'GO' button, and a checkbox for 'Participating'. To the right of the search area is an 'ADVANCED SEARCH' link. At the bottom, there is a 'MY DASHBOARD' section with tabs for 'CONSUMERS' and 'PROVIDERS'.

2. Navigate to the Consumer's record.

- Type the consumer's last name in the Quick Search text field (first field on the left)
- Ensure that the second field contains Consumers, third field contains last name and click "Go"

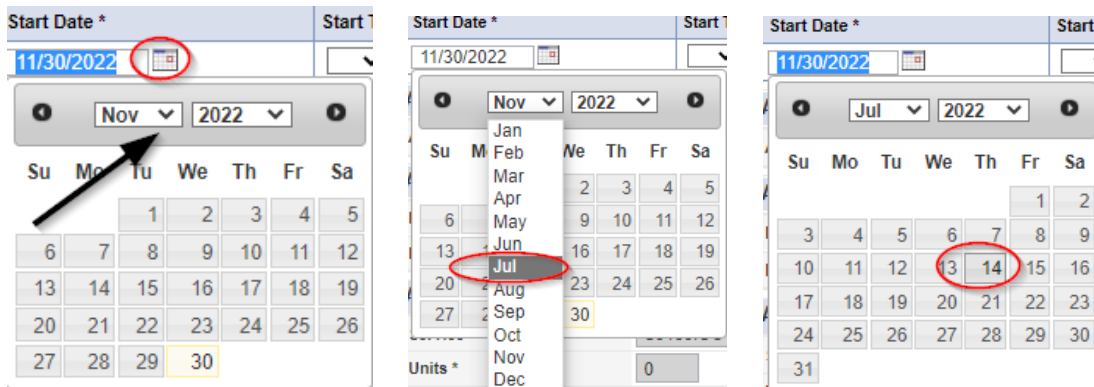


- Click the **Provider Documentation** tab > click **File > Add Provider Documentation**.

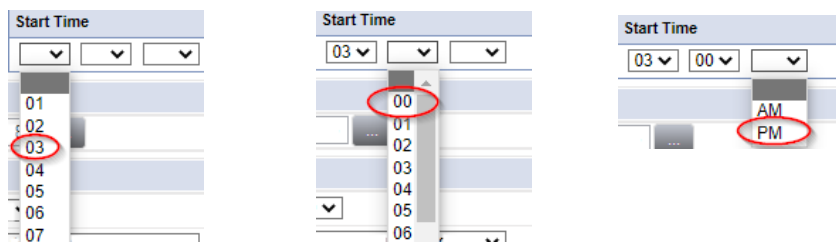


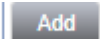
- The Provider Documentation Details page is displayed. Update the following fields:

- Start Date: Use the Calendar icon to select the date. The date will not change until the date is selected in the calendar menu.

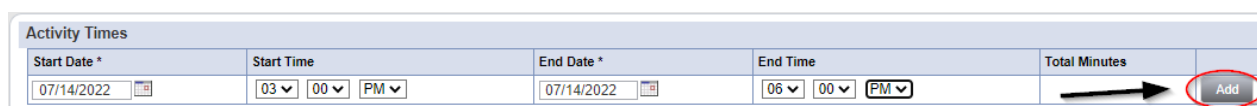


- Start Time: Use the Dropdown Menus to make the selections. Select the Hour, the Minute, and AM/PM.

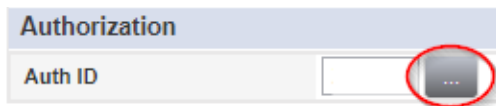


- c. End Date: End date may automatically populate to the same date, but if not make selection using the Calendar icon.
- d. End Time: Make selections from dropdown menus.
- e. Click **Add**. 

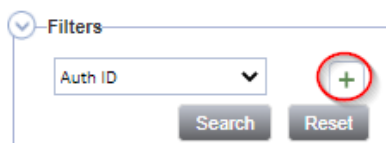
i. Notice a new line that appears for dates and times, do not add a second date unless instructed otherwise.



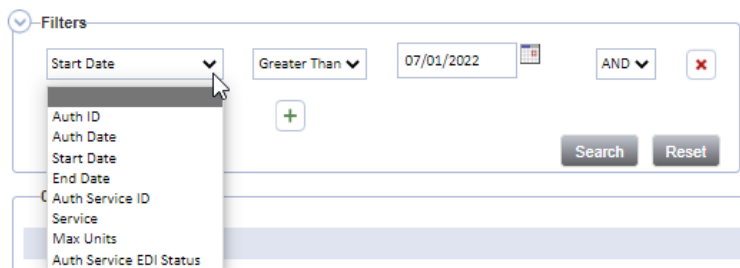
5. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations. There are specific circumstances in which you may skip this step, but that will be listed in the documentation specific instructions.



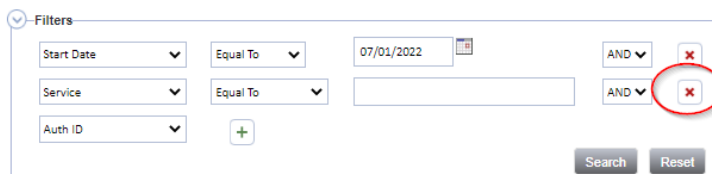
- a. Using the Filter Options can assist with locating the necessary Auth ID.
- b. Use the Green + to add filters.



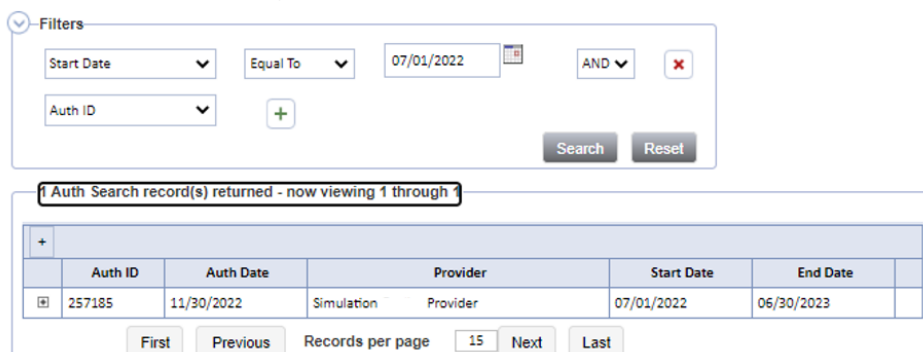
- c. Make the appropriate selections from the dropdown menus.



- 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.



Filters

Start Date Equal To 07/01/2022 AND

Auth ID

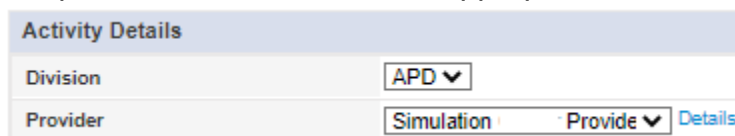
Search Reset

1 Auth Search record(s) returned - now viewing 1 through 1

Auth ID	Auth Date	Provider	Start Date	End Date
257185	11/30/2022	Simulation Provider	07/01/2022	06/30/2023

First Previous Records per page 15 Next Last

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 Details

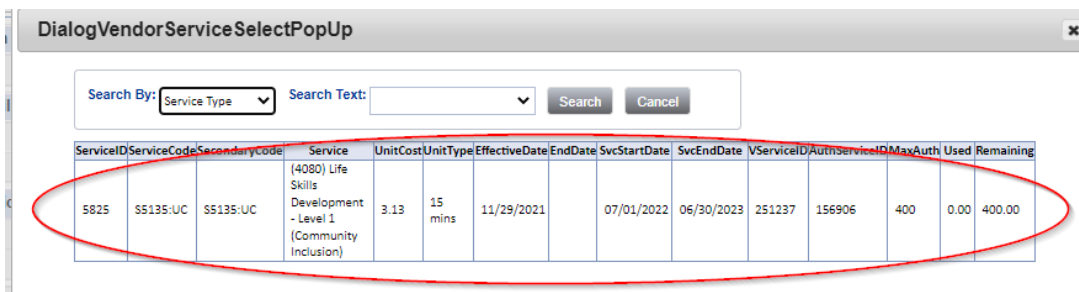
8. Click the box next to the Service field that contains an ellipsis (three dots) to display a list of services for this authorization.



Activity Services

Service *	Units *	Total

- a. Select the Service.



DialogVendorServiceSelectPopUp

Search By: Service Type Search Text:

Search Cancel

ServiceID	ServiceCode	SecondaryCode	Service	UnitCost	UnitType	EffectiveDate	EndDate	SvcStartDate	SvcEndDate	VServiceID	AuthServiceID	MaxAuth	Used	Remaining
5825	S5135:UC	S5135:UC	(4080) Life Skills Development - Level 1 (Community Inclusion)	3.13	15 mins	11/29/2021		07/01/2022	06/30/2023	251237	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		Total Cost
Service *	S5135.UC	\$37.58
Units *	12	
Rate	\$3.13	
Secondary Code	S5135.UC	

Activity Services		Total Cost
Service *	S5135.UC	\$0.00
Units *	1	
Rate	\$0.00	
Secondary Code	S5135.UC	
Unit Type	Units	

10. Provider Documentation Type = Select as needed.

a. Use the scrollbar to see all the selections.

Documentation	
Provider Documentation Type *	<div> Annual Report  Daily Attendance Log  Monthly R&amp;B  Monthly Summary  Progress Note  Quarterly Summary  Trip Log </div>

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 *	<div> Annual Report  Daily Attendance Log  Monthly R&amp;B  Monthly Summary  Progress Note  Quarterly Summary  Trip Log </div>

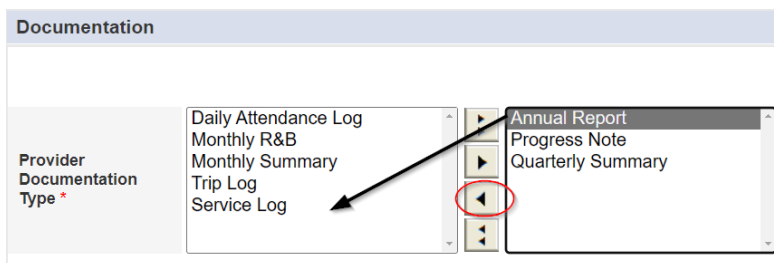
c. Ctrl + Mouse Clicks can be used to make multiple selections at one time (example below).

Documentation	
Provider Documentation Type *	<div> Annual Report  Daily Attendance Log  Monthly R&amp;B  Monthly Summary  Progress Note  Quarterly Summary  Trip Log </div>

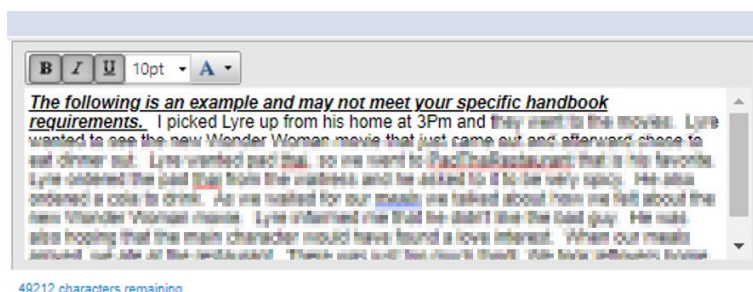
d. Selections should be moved to the box on the right.

Documentation	
Provider Documentation Type *	<div> Daily Attendance Log  Monthly R&amp;B  Monthly Summary  Trip Log  Service Log </div>

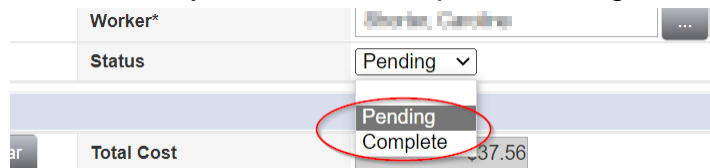
- e. If incorrect selections were made, use the carat pointing to the left to move those selections back into the original menu on the left.
  - i. Single carat moves the selected options.
  - ii. Double carats move all the items.



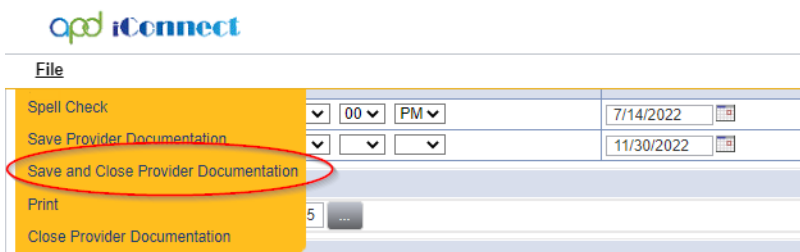
11. Note - Enter details of the services provided to the consumer by typing in the text box.



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.

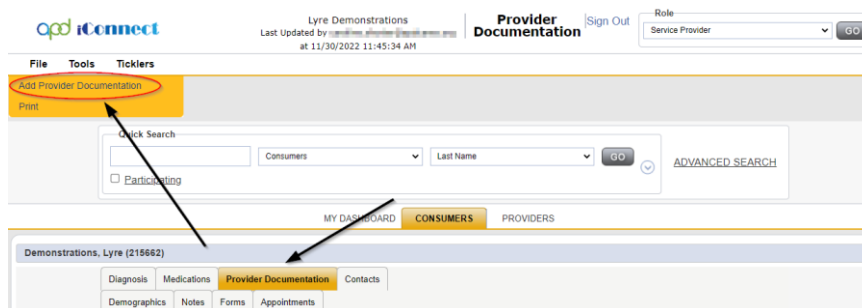


## Trip Logs

The Service Provider will record his/her Transportation Activities on the Provider Documentation tab in iConnect.

*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 Consumers 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 (these times can be approximations)
  - c. End Date: Select the Date of Service.
  - d. End Time: Select the end time of the service (these times can be approximations)
  - e. Click **Add**.


***IMPORTANT: Each Trip Log should contain one date of service if approved by trip and miles. DO NOT ADD MULTIPLE DATES (unless approved by the monthly rate).***

*Reminder: Any approximated transportation times should not overlap with other documented service delivery, such as ADT or Prevocational service delivery*

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 = Trip Log
9. Note = enter the trip log details:
  - Starting location (consumer's home for example)
  - Destination
  - The following is only required for the services approved for transportation by the **mile**.
  - Starting Odometer Reading (required for transportation authorized by miles)
  - Ending Odometer Reading (required for transportation authorized by miles)
  - Total Mileage (required for transportation authorized by miles)

## 10. Status = Complete



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**Provider Documentation**

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File

Activity Times					
Start Date *	Start Time	End Date *	End Time	Total Minutes	
7/11/2022	07:00 AM	7/11/2022	07:30 AM	30	Delete
12/01/2022		12/01/2022			Add

Authorization	
Auth ID: 257185	PA Number:

Activity Details	
Division: APD	Worker*:
Provider: Simulation Provide Details	Status: Complete

Activity Services	
Service *: T2002:UC (4310) Transportation - Month Clear	Total Cost: \$100.00
Units *: 1	
Rate: \$100.00	
Secondary Code: T2002:UC	
Unit Type: Month	

Documentation	
Provider Documentation Type * Annual Report Daily Attendance Log Monthly R&B Monthly Summary Progress Note Quarterly Summary Service Log	Trip Log Note * • Starting location Lyle's home (1234 E. Tampa St. Tampa FL 33602) • Starting Odometer Reading (1,200) • Destination (Big Top LDS 1234 E. Miami St. Tampa FL 33602) • Ending Odometer Reading (1,208) • Total Mileage (8 miles)

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