

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.

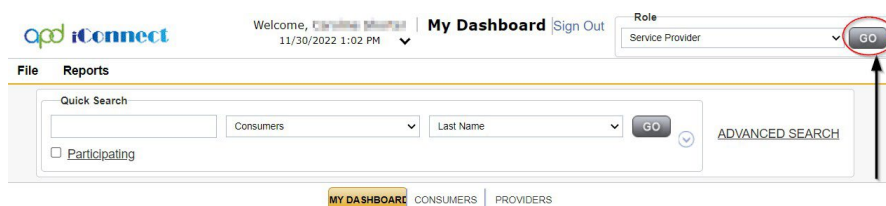
This job aid will encompass using iConnect to record services using the Provider Documentation Tab of the Consumer's record. If services are required to use the EVV system, this aid will not address those tasks, please refer to the [EVV Information and Training Material](#) website.

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.

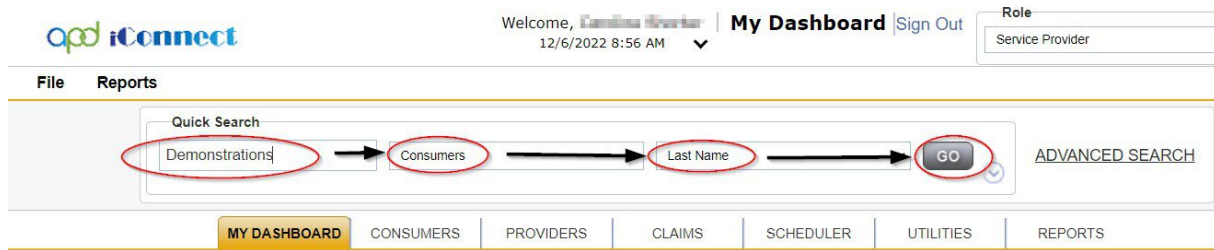
Intro to completing Provider Documentation Screens with detailed images

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

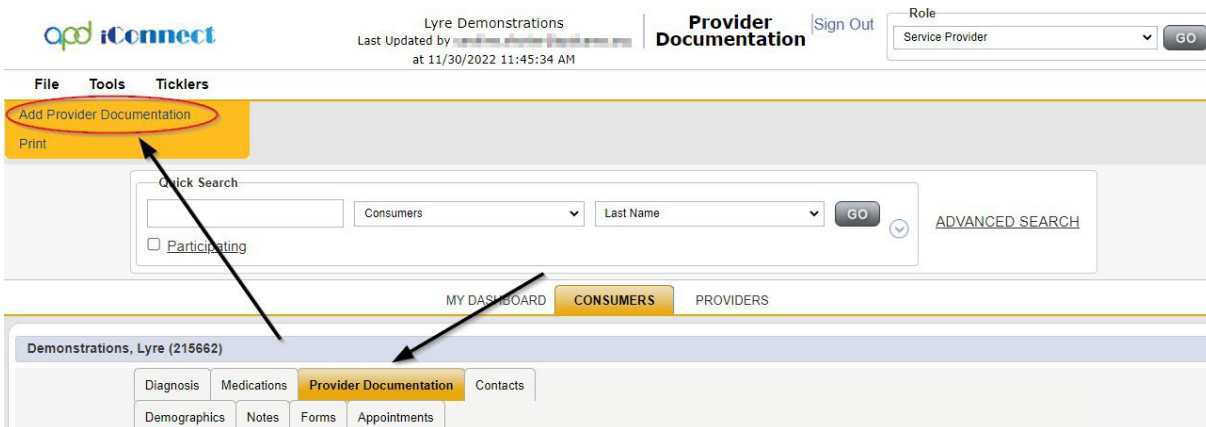


2. Navigate to the Consumer's record.

- 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"

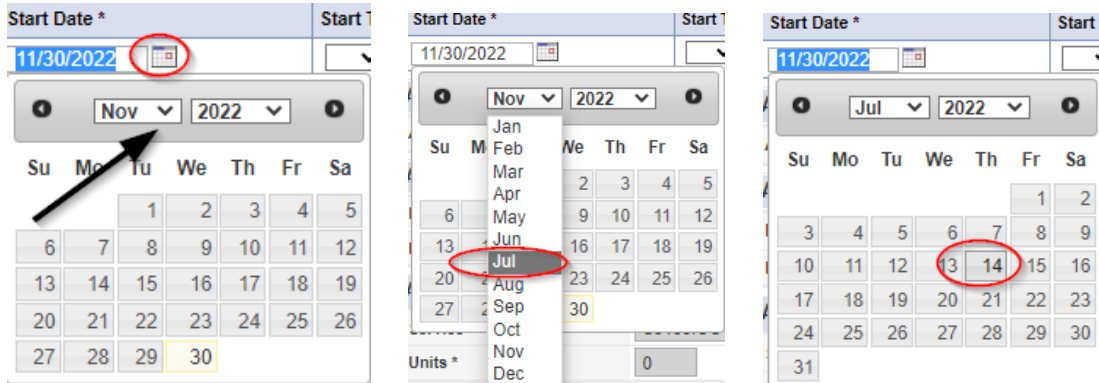


3. Click the **Provider Documentation** tab > click **File > Add Provider Documentation**.

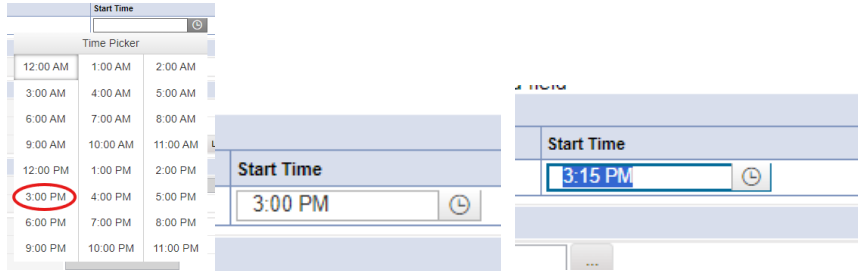


4. The Provider Documentation Details page is displayed. Update the following fields:

- 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 Clock icon to make the selections. Select the Hour with the correct AM/PM and then type in the Minutes.



- 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 the Clock icon for the Hour and type in the Minutes.

e. Click **Add**.



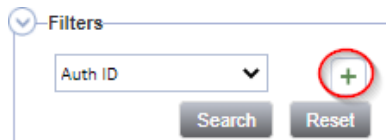
Start Date *	Start Time	End Date *	End Time	Total Minutes	
07/14/2022	3:00 PM	07/14/2022	3:15 PM		Add

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

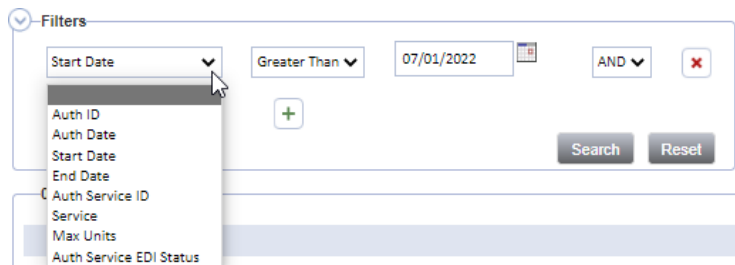
5. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations. There are specific circumstances in which you may skip this step, but that will be listed in the documentation specific instructions.



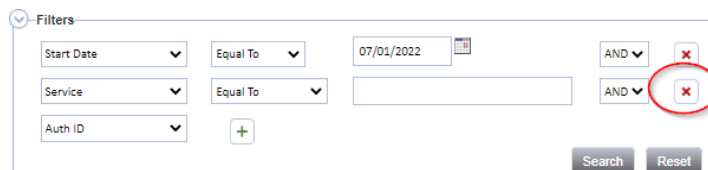
- a. Using the Filter Options can assist with locating the necessary Auth ID.
- b. Use the Green + to add filters.



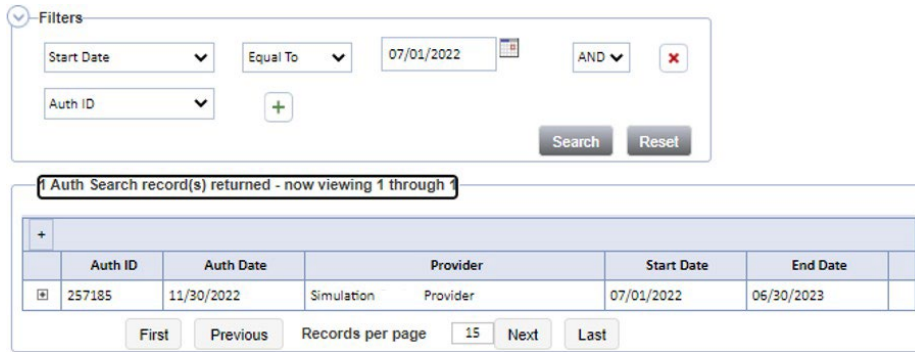
- c. Make the appropriate selections from the dropdown menus.



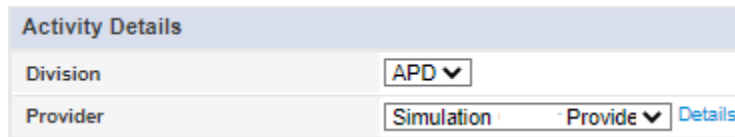
- d. Use the Red X to remove filters.



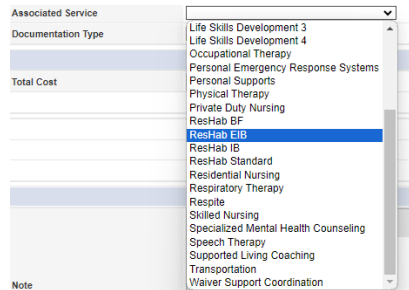
- e. Click the Search button.
- 6. Click the Authorization. The Authorization ID is populated on the Provider Documentation details page.



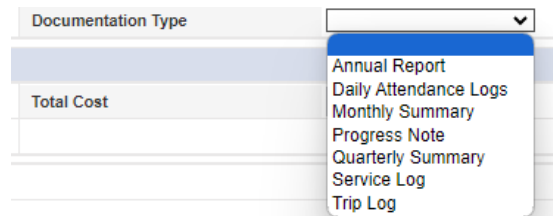
- 7. Verify that the Division and Provider information have been populated. If they are not, use the dropdown menus to make the appropriate selections.



- 8. Associated Service can be chosen when inputting Annual Report, Quarterly Report, and any other provider documentation for quick reference in the Provider Documentation tab of the Consumer’s record. Select the appropriate service associated with the provider documentation from the drop-down menu.



- 9. Documentation Type can be chosen when inputting Annual Report, Quarterly Report and any other provider documentation for quick reference in the Provider Documentation tab of the Consumer’s Record. Select the appropriate documentation type associated with the provider documentation from the drop-down menu.



Here is an example of the list grid view of the Provider Documentation in the Consumer's Record with the Associated Service and Documentation Type utilized.

—240 Consumers Provider Documentation record(s) returned - now viewing 1 through 15

Activity ID	Date	Worker	Provider	Service Code	Units	Status	Associated Service	Documentation Type
5694854	04/14/2023	Provider, Sylvia	[REDACTED]	S5130 UC	4.00	Pending	Supported Living Coaching	Annual Report

10. 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 * Total

Units *

a. Select the Service.

DialogVendorServiceSelectPopUp

Search By: Search Text:

ServiceID	ServiceCode	SecondaryCode	Service	UnitCost	UnitType	EffectiveDate	EndDate	SvcStartDate	SvcEndDate	VServiceID	AuthServiceID	MaxAuth	Used	Remaining
S825	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.

11. 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

Service * Total Cost

Units *

Rate

Secondary Code

Activity Services

Service * Total Cost

Units *

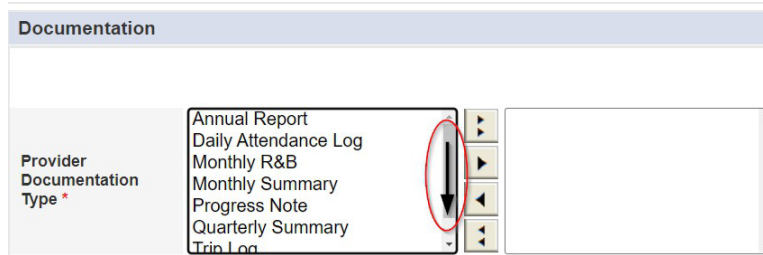
Rate

Secondary Code

Unit Type

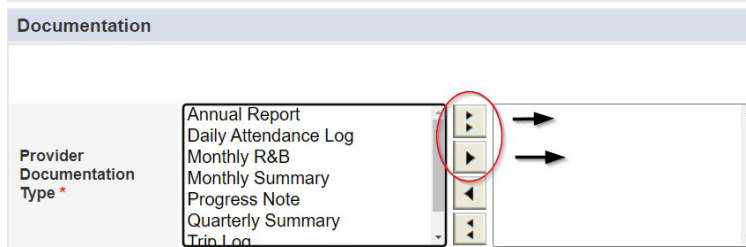
12. Provider Documentation Type = Select as needed.

a. Use the scrollbar to see all the selections.

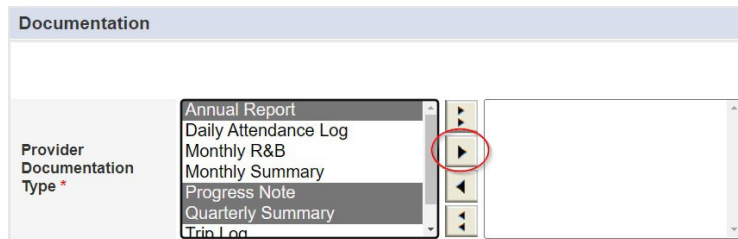


b. The caret pointing to the right will move selections to the box on the right.

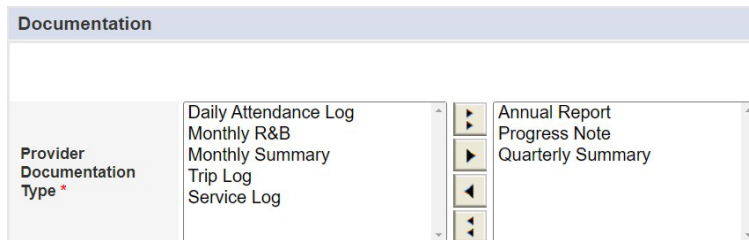
- i. Single caret moves the selected options.
- ii. Double carets move all the items.



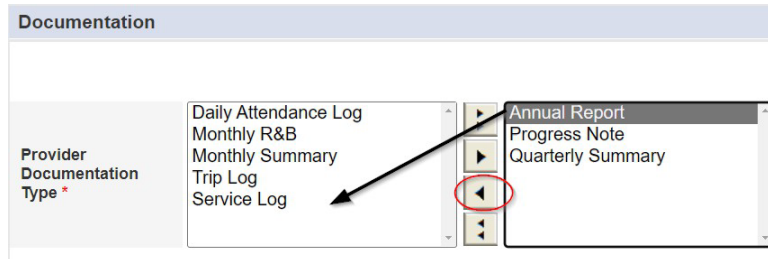
c. Ctrl + Mouse Clicks can be used to make multiple selections at one time (example below).



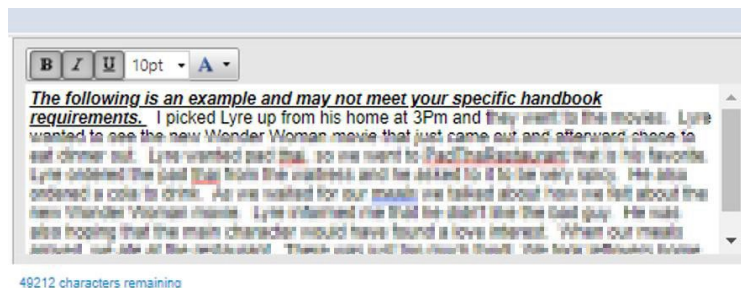
d. Selections should be moved to the box on the right.



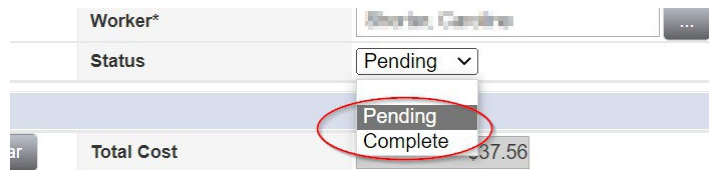
- e. If incorrect selections were made, use the caret pointing to the left to move those selections back into the original menu on the left.
 - i. Single caret moves the selected options.
 - ii. Double carets move all the items.



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



14. Status - Can be updated by using the dropdown menu. This should be changed to Complete once the activity is finalized and prior to billing.



15. File > Save and Close Provider Documentation.



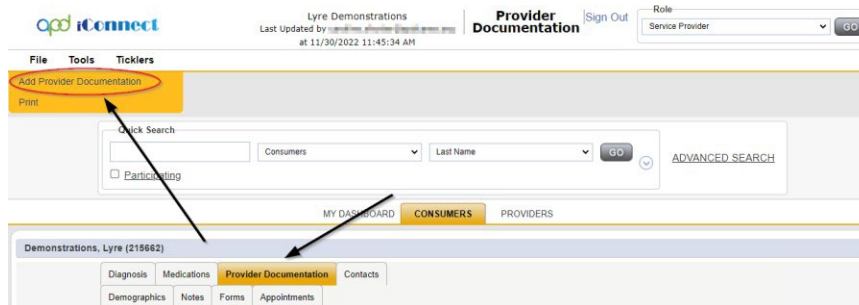
Service Log

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

- Special Medical Home Care
- Behavior Analysis
- Behavior Assistant
- Life Skills Development 1(Companion)
- Life Skills Development 2 (Supported Employment)
- Personal Supports (EVV Exempt)
- Respite (provided in a licensed facility)
- Personal Emergency Response Systems (these providers can submit a detailed invoice in lieu of service logs)

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

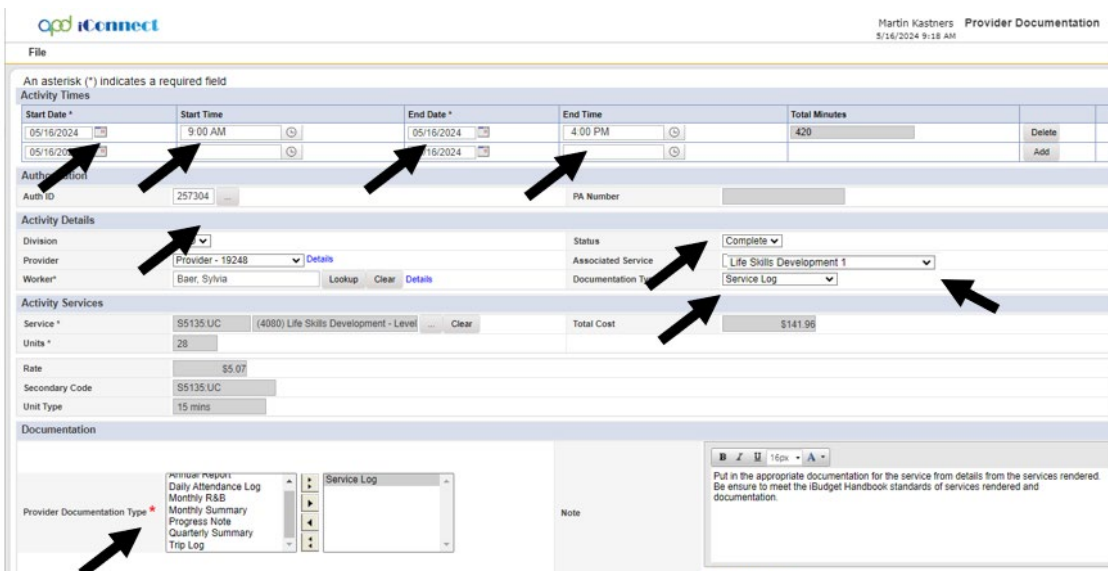
1. To begin, log into iConnect and set Role = **Service Provider** or **Service Provider Worker**. Click **Go**.
2. Navigate to the Consumers record and click the **Provider Documentation** tab > click **File > Add Provider Documentation**.



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
 - 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. Add the Associated Service from the drop-down menu.
7. Add the Documentation Type from the drop-down menu.
8. 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.
9. Verify the number of Units is populated. Note the Total Cost value changes as the number of Units change.
10. Provider Documentation Type = Select Service Log.
 - a. If additional selections are needed, make those additional selections too.
11. Note = Enter details of the services provided to the consumer.
10. Status = Complete.
11. Click **File > Save and Close Provider Documentation.**



The screenshot shows the 'Provider Documentation' form in the 'apod iConnect' system. The form is titled 'Provider Documentation' and shows fields for Activity Times, Activity Details, Activity Services, and Documentation. Arrows point to specific fields: Start Date, Start Time, End Date, End Time, Auth ID, Provider, Worker, Associated Service, Documentation Type, Service, Units, Rate, and Provider Documentation Type.

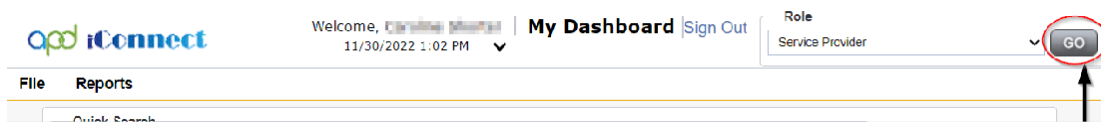
Monthly Summary

A monthly summary is a written summary of the activities that took place during each month, including the consumer's progress toward achieving goals. **Add the Monthly Summary as a separate activity using the 0000-WVR Code.**

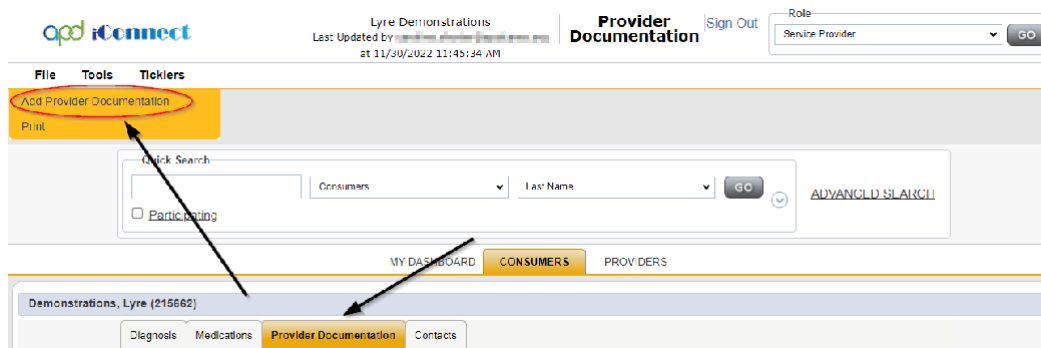
Please refer to [the Intro to completing Provider Documentation Screens with detailed images for instructions](#) on how to complete each field.

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**.



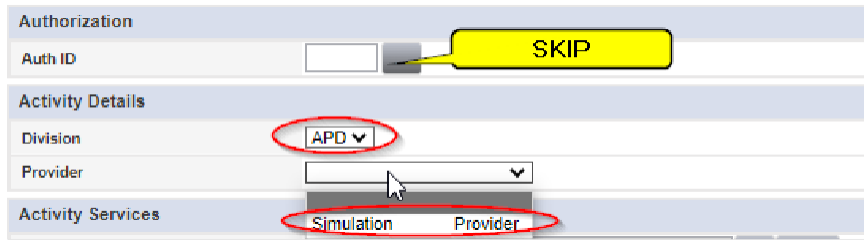
3. The Provider Documentation Details page is displayed. Update the following fields:

- 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**.

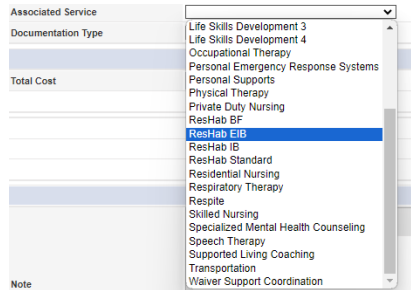
4. **SKIP the AUTH ID Section**

5. Since the Auth usually populates the following fields, make sure to complete the following additional sections (select from dropdown menu).

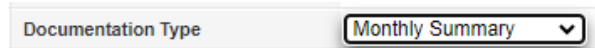
- a. Division = APD
- b. Provider = The organization represented



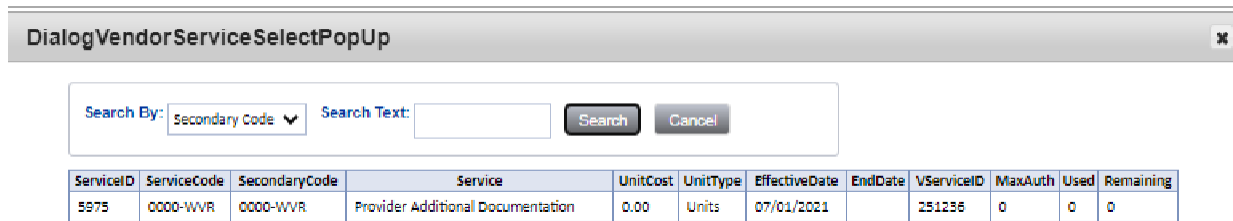
6. Select the appropriate service associated with the provider documentation from the drop-down menu.



7. Documentation Type choose Monthly Summary.



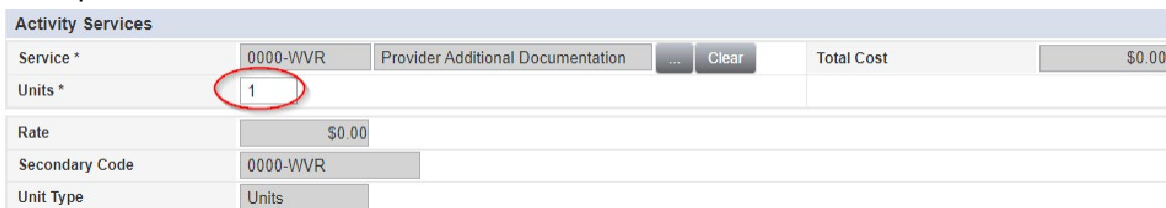
8. Click the box next to the Service field that contains an ellipsis (three dots) to display a list of services for this authorization. Select the 0000-WVR Service.



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.

9. Update the number of units to 1.

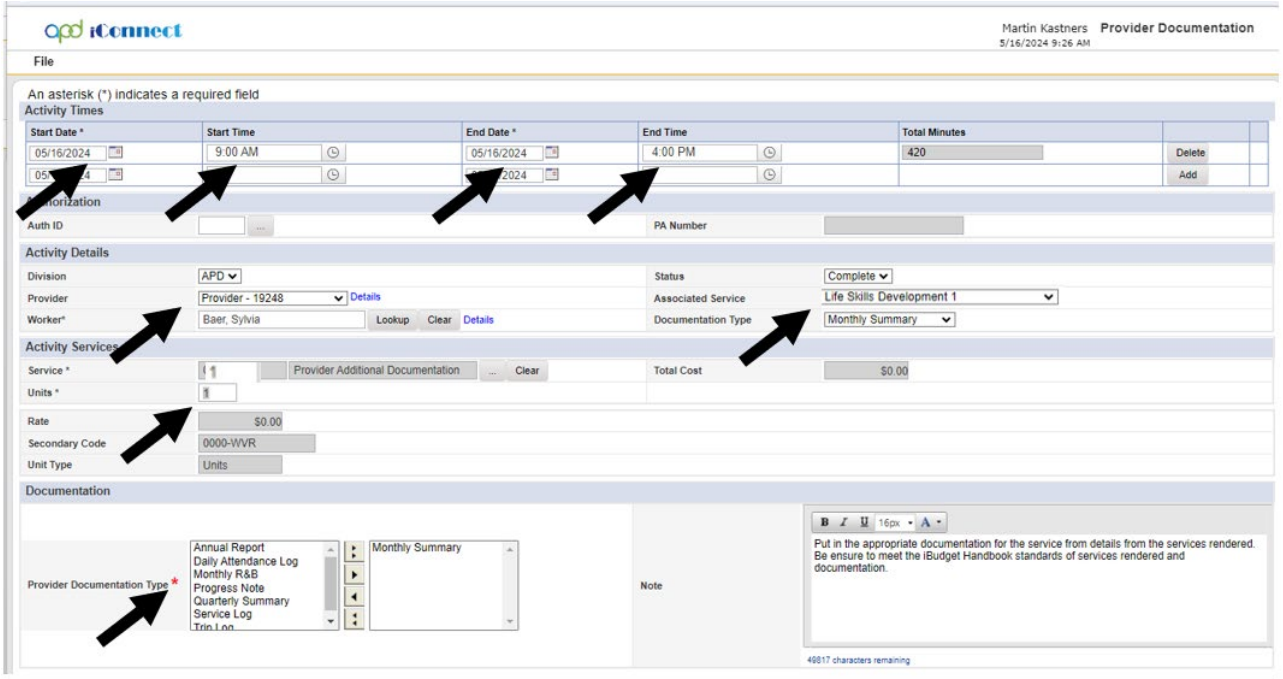


Activity Services	
Service *	0000-WVR Provider Additional Documentation [Clear] Total Cost \$0.00
Units *	1
Rate	\$0.00
Secondary Code	0000-WVR
Unit Type	Units

10. Provider Documentation Type = Monthly Summary

11. 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



The screenshot shows the 'iConnect' Provider Documentation form. It includes sections for 'Activity Times', 'Authorization', 'Activity Details', 'Activity Services', and 'Documentation'. Arrows point to the following fields:

- Activity Times:** Start Date, Start Time, End Date, End Time, and Total Minutes.
- Authorization:** Auth ID and PA Number.
- Activity Details:** Division, Provider, Worker, Status, Associated Service, and Documentation Type.
- Activity Services:** Service, Units, Rate, Secondary Code, and Unit Type.
- Documentation:** Provider Documentation Type and a Note field.

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

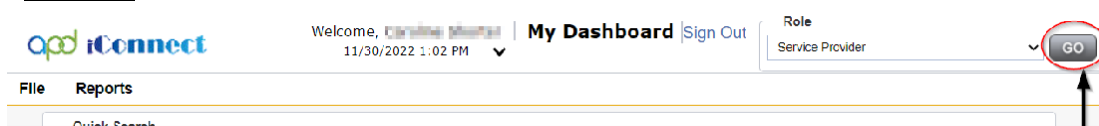
Quarterly Summary

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. **Add the Quarterly Summary as a separate activity using the 0000-WVR Code.**

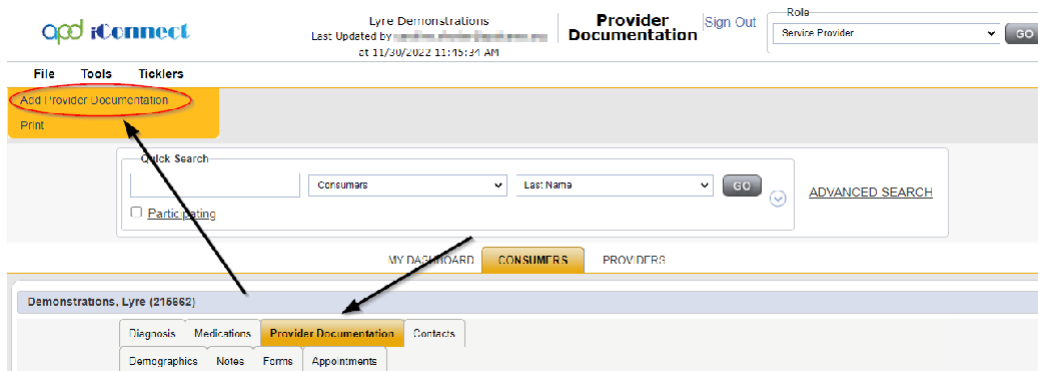
Please refer to [the Intro to completing Provider Documentation Screens with detailed images for instructions](#) on how to complete each field.

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:

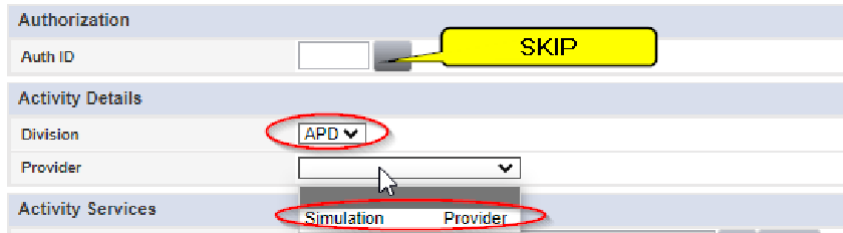
- a. Start Date: Select the Date of Service.
- b. Start Time: Select the start time of the service
- c. End Date: Select the Date of Service.
- d. End Time: Select the end time of the service
- e. Click **Add**.

4. **SKIP the AUTH ID Section**

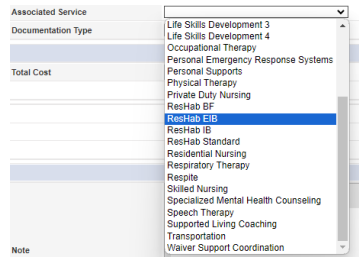
5. Since the Auth usually populates the following fields, make sure to complete the following additional sections (select from dropdown menu).

- a. Division = APD

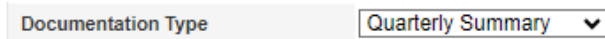
b. Provider = The organization represented



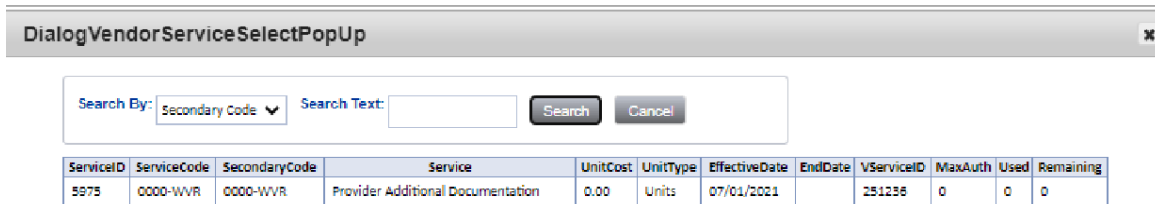
6. Select the appropriate service associated with the provider documentation from the drop-down menu.



7. Documentation Type will be Quarterly Summary.



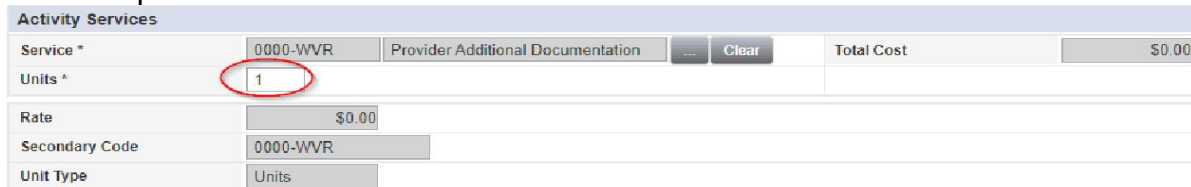
8. Click the box next to the Service field that contains an ellipsis (three dots) to display a list of services for this authorization. Select the 0000-WVR Service.



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		251295	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.

9. Update the number of units to 1.

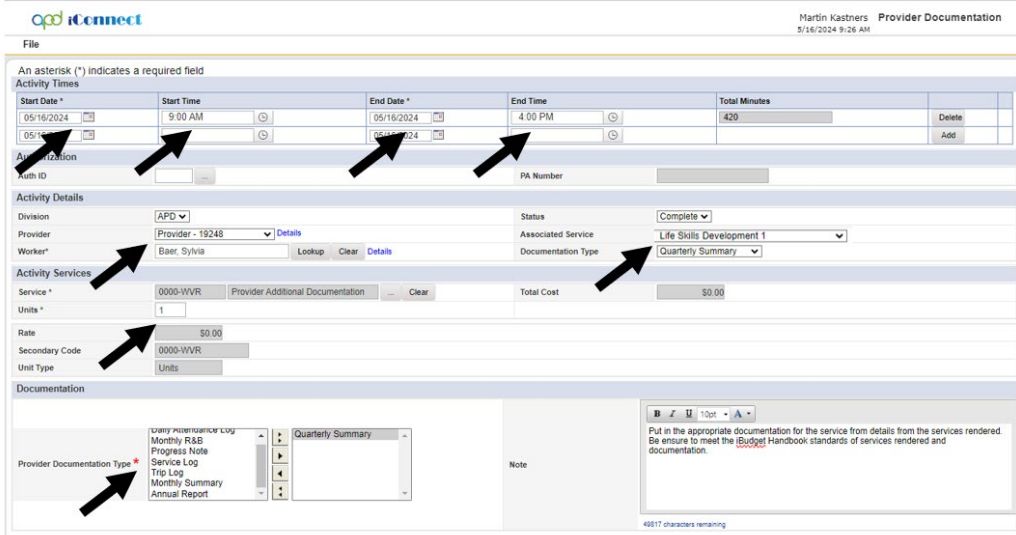


Activity Services		Total Cost
Service *	0000-WVR Provider Additional Documentation	\$0.00
Units *	1	
Rate	\$0.00	
Secondary Code	0000-WVR	
Unit Type	Units	

10. Provider Documentation Type = Quarterly Summary

11. 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



An asterisk (*) indicates a required field

Activity Times

Start Date *	Start Time	End Date *	End Time	Total Minutes	Delete
05/16/2024	9:00 AM	05/16/2024	4:00 PM	420	
05/16/2024		05/16/2024			Add

Activity Details

Division: APD
 Provider: Provider - 19248
 Worker: Baer, Sylvia
 Status: Complete
 Associated Service: Life Skills Development 1
 Documentation Type: Quarterly Summary

Activity Services

Service: 0000-WVR
 Units: 1
 Rate: \$0.00
 Secondary Code: 0000-WVR
 Unit Type: Units
 Total Cost: \$0.00

Documentation

Provider Documentation Type: Quarterly Summary

Note: Put in the appropriate documentation for the service from details from the services rendered. Be ensure to meet the Budget Handbook standards of services rendered and documentation.

11. Click File > Save and Close Provider Documentation.

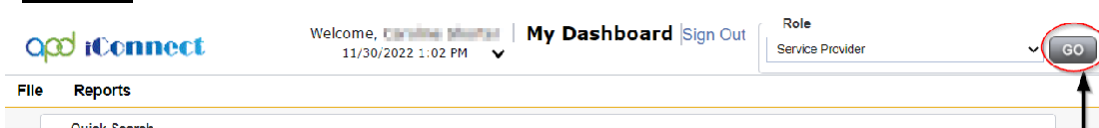
Annual Report

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. **Add the Annual Report as a separate activity using the 0000-WVR Code.**

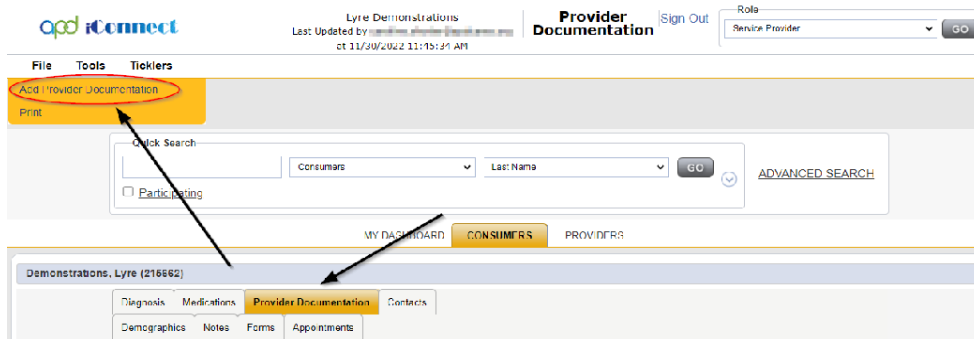
Please refer to [the Intro to completing Provider Documentation Screens with detailed images for instructions](#) on how to complete each field.

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:

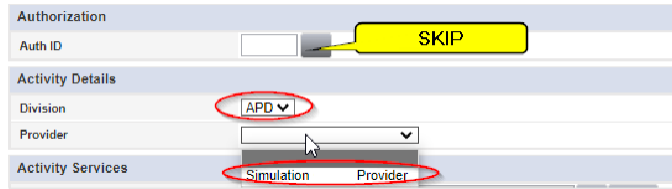
- a. Start Date: Select the Date of Service.
- b. Start Time: Select the start time of the service
- c. End Date: Select the Date of Service.
- d. End Time: Select the end time of the service
- e. Click **Add**.

4. **SKIP the AUTH ID Section**

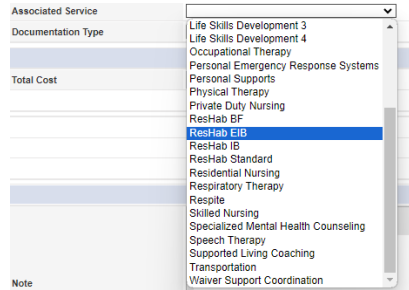
5. Since the Auth usually populates the following fields, make sure to complete the following additional sections (select from dropdown menu).

- a. Division = APD

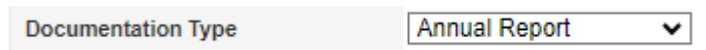
b. Provider = The organization represented



6. Select the appropriate service associated with the provider documentation from the drop-down menu.



7. Documentation Type will be Annual Report.



8. 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.

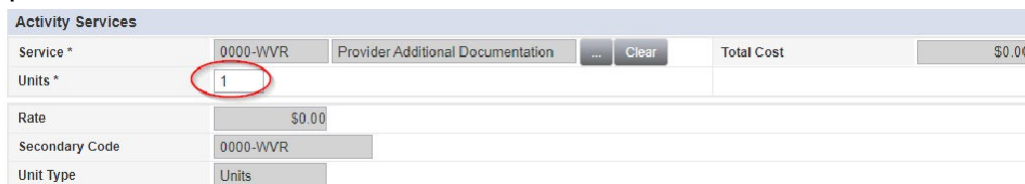
DialogVendorServiceSelectPopUp

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.

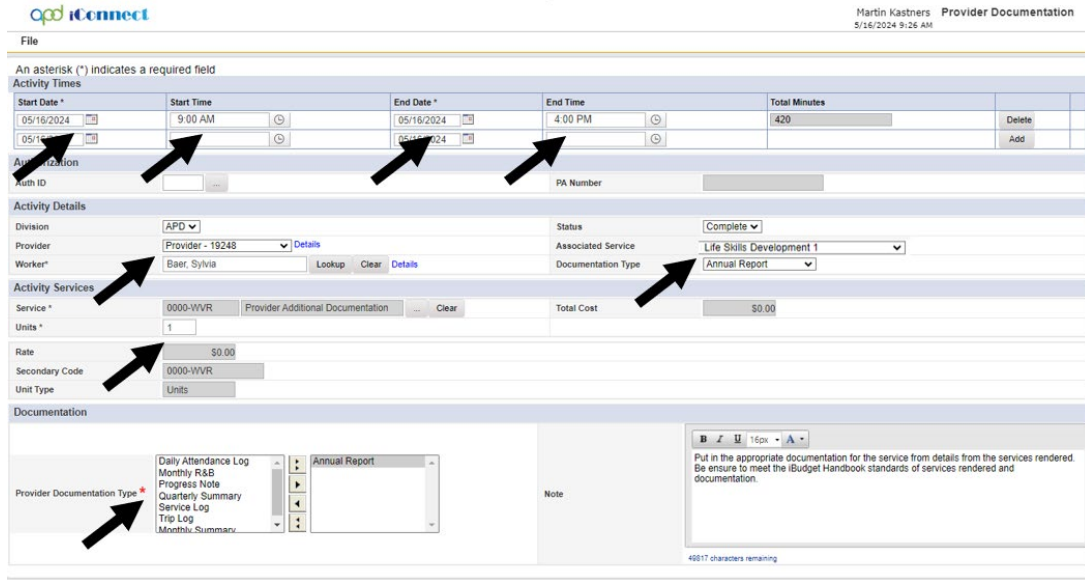
9. Update the number of units to 1.



10. Provider Documentation Type = Annual Report

11. 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



The screenshot shows the 'Provider Documentation' form in the iConnect system. The form is titled 'Provider Documentation' and includes a user name 'Martin Kastners' and a timestamp '5/16/2024 9:26 AM'. The form is divided into several sections: 'Activity Times', 'Activity Details', 'Activity Services', and 'Documentation'. Arrows point to the following fields: 'Start Date', 'Start Time', 'End Date', 'End Time', 'Status', 'Associated Service', 'Documentation Type', 'Service', 'Units', 'Rate', 'Secondary Code', 'Unit Type', and 'Provider Documentation Type'.

Activity Times

Start Date *	Start Time	End Date *	End Time	Total Minutes	Delete	Add
05/16/2024	9:00 AM	05/16/2024	4:00 PM	420		
05/16/2024		05/16/2024				

Activity Details

Division: APD
 Provider: Provider - 19248
 Worker: Baer, Sylvia
 Status: Complete
 Associated Service: Life Skills Development 1
 Documentation Type: Annual Report

Activity Services

Service: 0000-WVR
 Units: 1
 Rate: \$0.00
 Secondary Code: 0000-WVR
 Unit Type: Units
 Total Cost: \$0.00

Documentation

Provider Documentation Type: Annual Report
 Note: Put in the appropriate documentation for the service from details from the services rendered. Be ensure to meet the iBudget Handbook standards of services rendered and documentation.
 48817 characters remaining

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