

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.

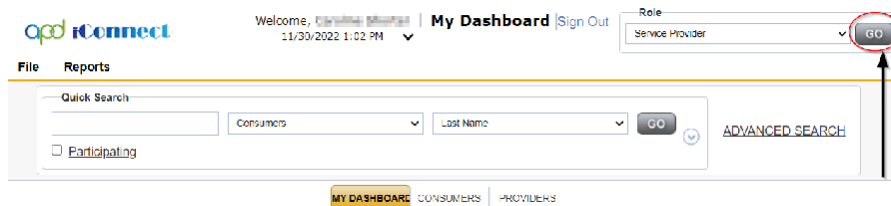
This job aid will encompass using iConnect to record services using the Provider Documentation Tab of the Consumer’s record. If services are required to use the EVV system, this aid will not address those tasks, please refer to the [EVV Information and Training Material](#) website.

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).

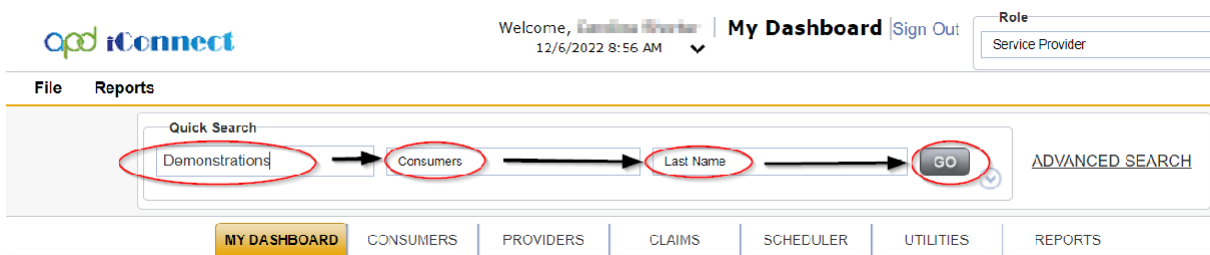
Please refer to the [Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook](#) for specific documentation requirements. Services provided after the implementation of iConnect must be added to iConnect prior to billing. Once a service is live in iConnect, the contracted vendor monitoring handbook compliance will look for documentation in iConnect.

Intro to completing Provider Documentation Screens with detailed images

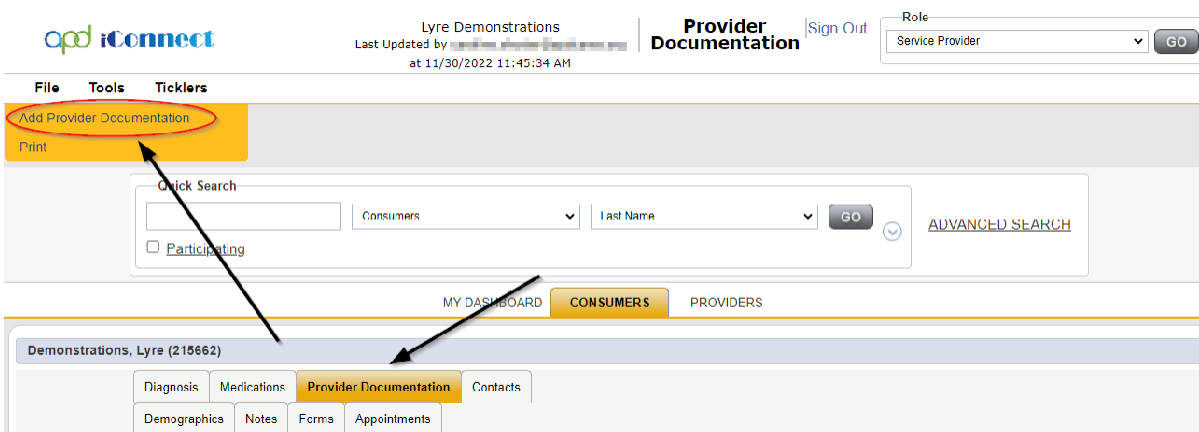
1. To begin, log into iConnect and set Role = **Service Provider** or **Service Provider Worker**. Click **Go**



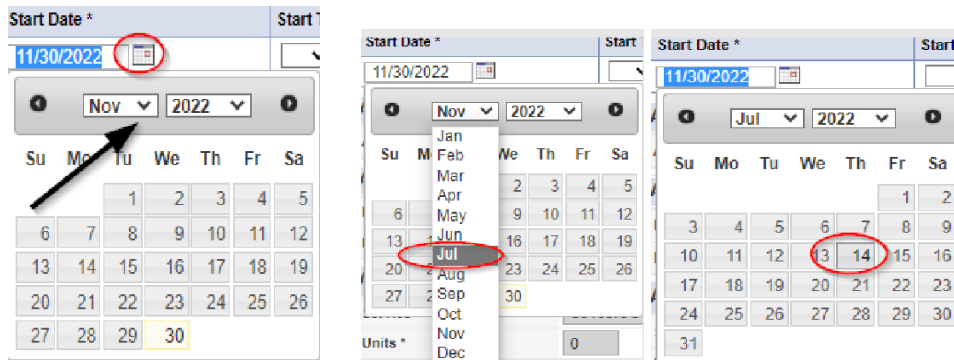
2. Navigate to the Consumer's record.
 - a. Type the consumer's last name in the Quick Search text field (first field on the left)
 - b. Ensure that the second field contains Consumers, third field contains last name and click "Go"



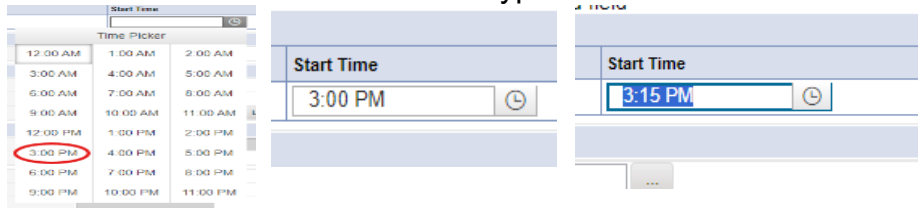
3. Click the **Provider Documentation** tab > click **File** > **Add Provider Documentation**.



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**.



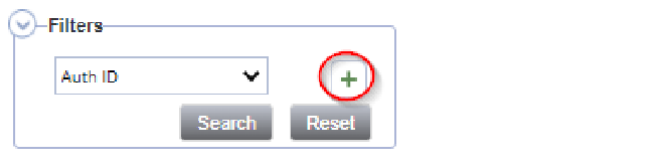
Start Date *	Start Time	End Date *	End Time	Total Minutes	
07/14/2022	3:00 PM	07/14/2022	3:15 PM		Add

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

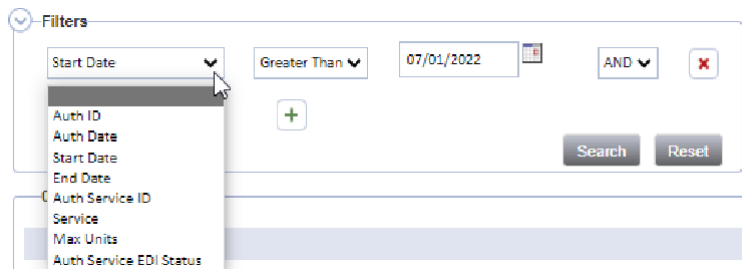
- 5. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations. There are specific circumstances in which you may skip this step, but that will be listed in the documentation specific instructions.



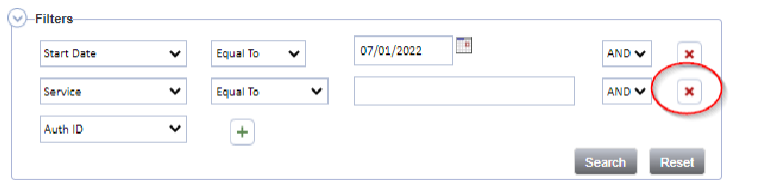
- a. Using the Filter Options can assist with locating the necessary Auth ID.
- b. Use the Green + to add filters.



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

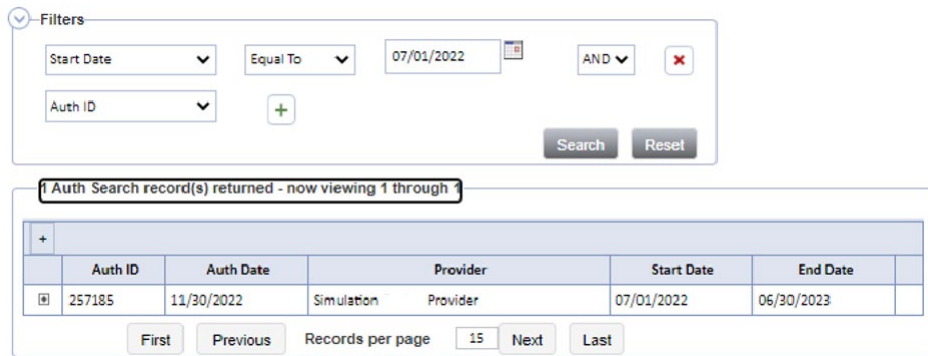


d. Use the Red X to remove filters.



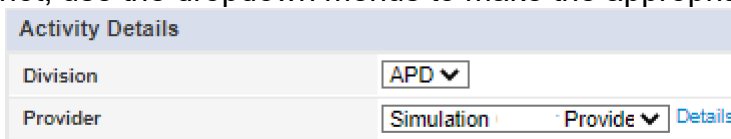
e. Click the Search button.

6. Click the Authorization. The Authorization ID is populated on the Provider Documentation details page.

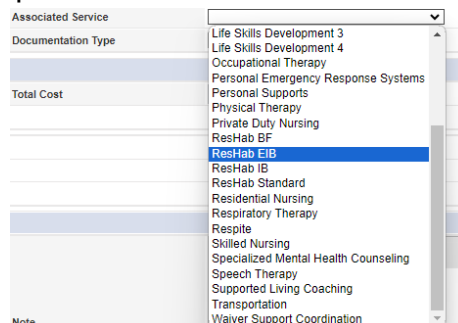


Auth ID	Auth Date	Provider	Start Date	End Date
257185	11/30/2022	Simulation Provider	07/01/2022	06/30/2023

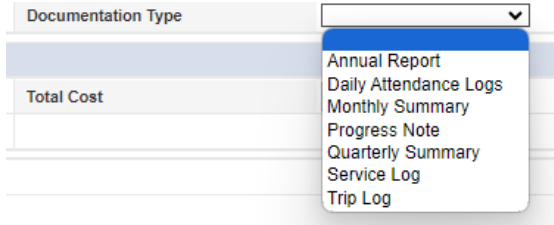
7. Verify that the Division and Provider information have been populated. If they are not, use the dropdown menus to make the appropriate selections.



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.



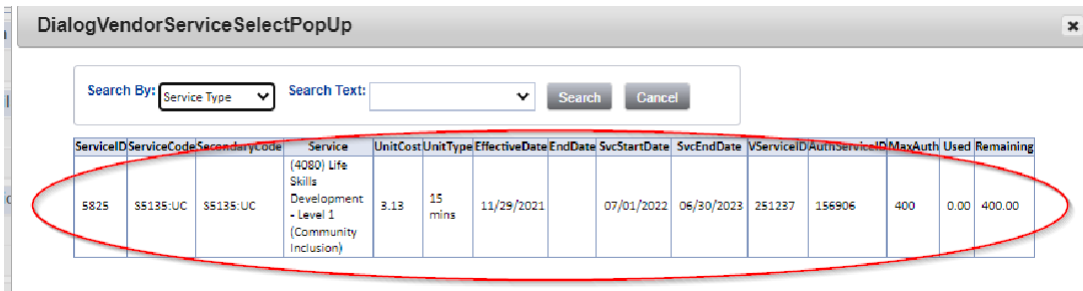
9. Documentation Type can be chosen when inputting Annual Report, Quarterly Report and any other provider documentation for quick reference in the Provider Documentation tab of the Consumer's Record. Select the appropriate documentation type associated with the provider documentation from the drop-down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



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



- a. Select the Service.

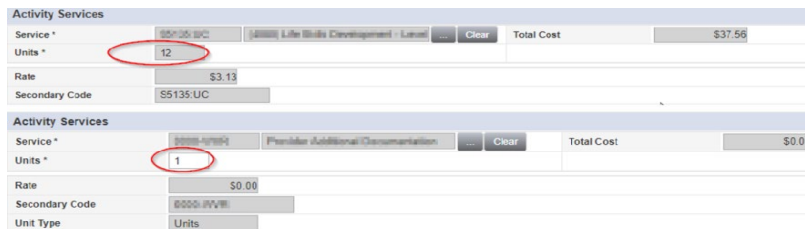


ServiceID	ServiceCode	SecondaryCode	Service	UnitCost	UnitType	EffectiveDate	EndDate	SvcStartDate	SvcEndDate	VServiceID	AuthServiceID	MaxAuth	Used	Remaining
5825	SS135-UC	SS135-UC	(4080) Life Skills Development - Level 1 (Community Inclusion)	3.13	15 mins	11/29/2021		07/01/2022	06/30/2023	251237	156906	400	0.00	400.00

- b. The Activity Services details are populated on the Provider Documentation details page.

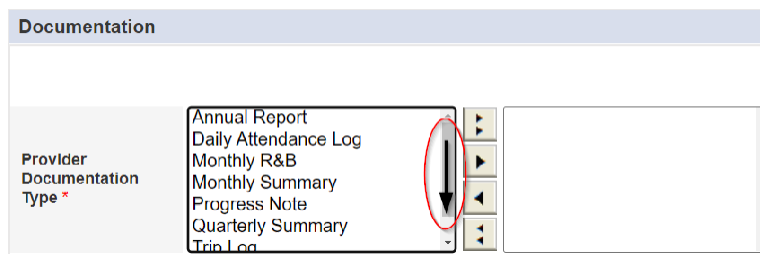
11. Verify/update the number of Units as needed. Some services are programmed to populate this field, whereas other services are not programmed to populate this field.

- 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.



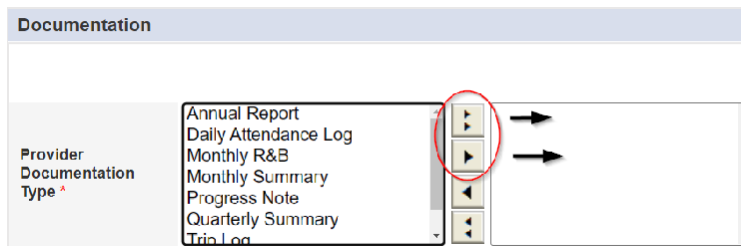
12. Provider Documentation Type = Select as needed.

a. Use the scrollbar to see all the selections.

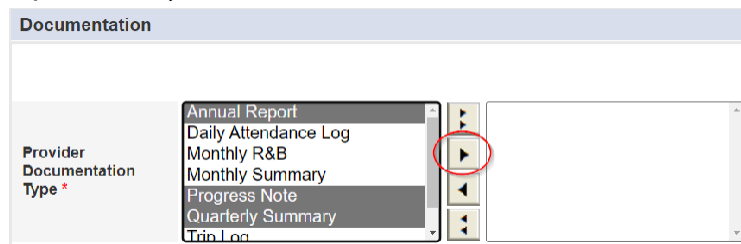


b. The caret pointing to the right will move selections to the box on the right.

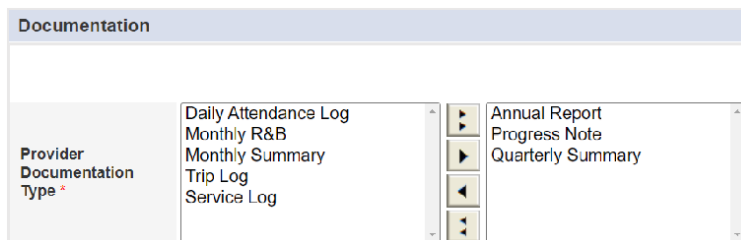
- i. Single caret moves the selected options.
- ii. Double carets move all the items.



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

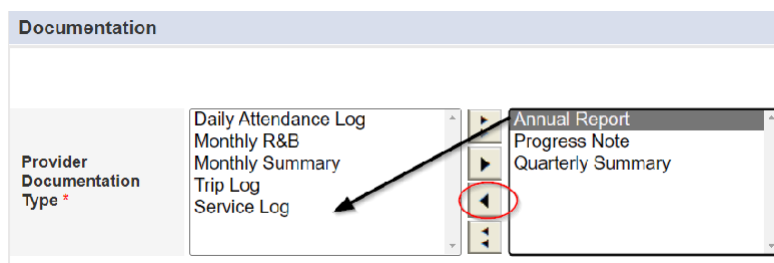


d. Selections should be moved to the box on the right.

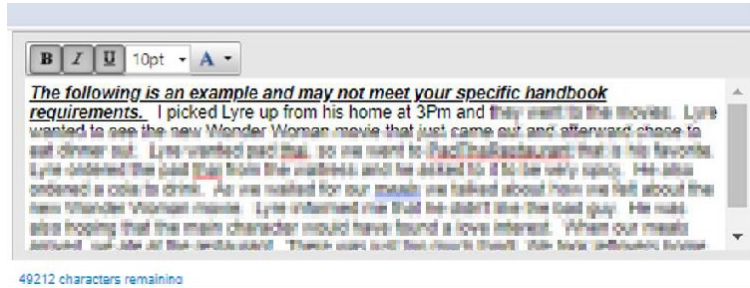


e. If incorrect selections were made, use the caret pointing to the left to move those selections back into the original menu on the left.

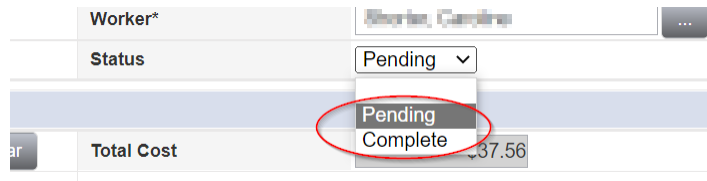
- i. Single caret moves the selected options.
- ii. Double carets move all the items.



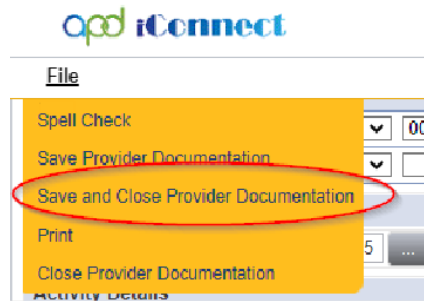
13. Note - Enter details of the services provided to the consumer by typing in the text box.



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.



Daily Attendance Log

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

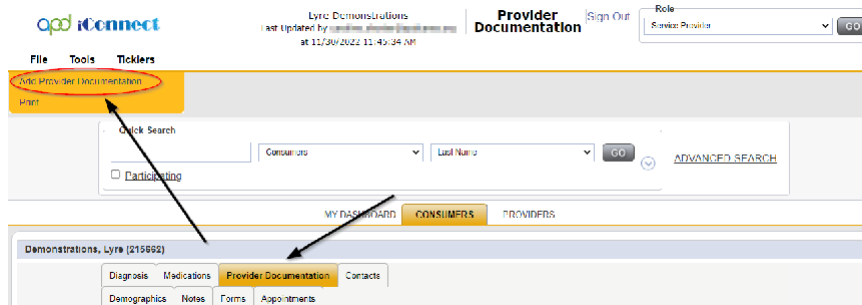
- Life Skills Development 3 (Adult Day Training)
- Life Skills Development 4 (Prevocational Services)
- Residential Habilitation Services

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

Notice that Attendance Logs are unique in that one provider documentation activity will contain multiple dates, depending on the type of service provided.

- Daily Attendance Logs for ResHab Services will contain all dates of service for the month.
 - *ResHab Services must be 24+ days to use the monthly rate. If the Service provides less than 24 days, the service must use the daily rate.*
- Daily Attendance Logs for LSD3 and LSD4 Services will contain all dates of service for the week.

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: Repeat this step to add all the days in which this individual received services for

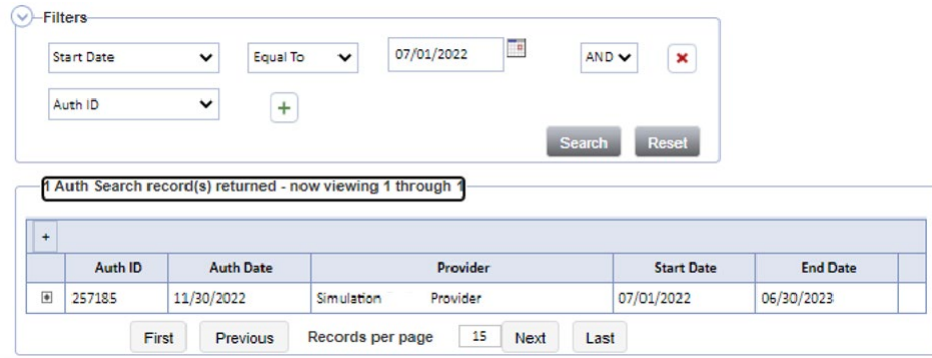
- **the week** when documenting daily attendance for LSD3 and LSD4
- **the month** when documenting daily attendance for Residential Habilitation Services
 - Additionally, when Residential Habilitation services are approved (with either the monthly or the daily rate) the start date can be the beginning of the month and the end date can be the last day of the month (ie: intervals).
 - For example:
01/01/2024 12:00AM - 01/31/2024, 11:59PM
 - If an individual is not at the home during specific dates within the month, then there will be multiple intervals.
 - For example, when an individual resides in the licensed facility on weekdays, then intervals can include
01/01/2024 12:00AM - 01/05/2024, 11:59PM
01/08/2024 12:00AM - 01/12/2024 11:59PM
01/15/2024 12:00AM - 01/19/2024 11:59PM
01/22/2024 12:00AM - 01/26/2024 11:59PM
01/22/2024 12:00AM - 01/26/2024 11:59PM
01/29/2024 12:00AM - 01/31/2024 11:59PM

4. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations.



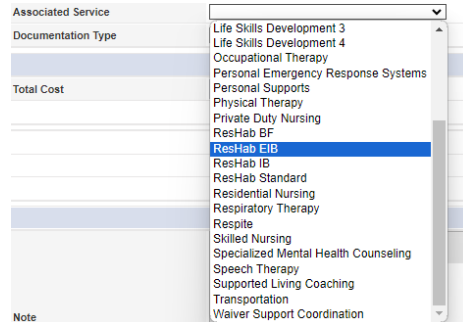
IMPORTANT: Ensure the appropriate Authorization ID is chosen for the appropriate timeframe of service provided. If there is a need to obtain a new auth id with the day rate, Providers must contact the WSCs and withhold documenting the service until the WSC makes the change in the consumer's cost plan and issues a corrected Authorization.

5. Click the Authorization.
- a. The Authorization ID will populate on the Provider Documentation details page.

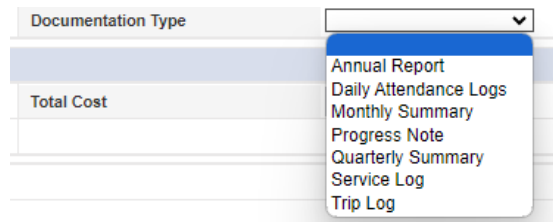


6. The Authorization ID will populate on the Provider Documentation details page.

7. Add the Associated Service from the drop-down menu.



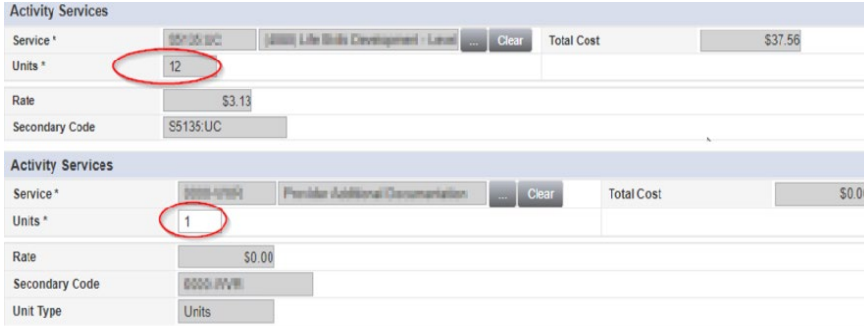
8. Add the Documentation Type from the drop-down menu.



9. 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. The Activity Services details are populated on the Provider Documentation details page.

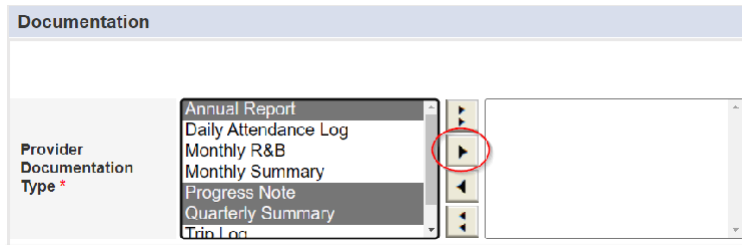


10. Verify the number of Units is populated. If needed, populate this with the quantity of units being documented (ex. Monthly ResHab services require manual entry). Note the Total Cost value changes as the number of Units change.



Activity Services		Total Cost
Service *	S5135 UC (4080) Life Skills Development - Level	\$37.56
Units *	12	
Rate	\$3.13	
Secondary Code	S5135 UC	
Activity Services		Total Cost
Service *	6000 PVR Provider Additional Documentation	\$0.00
Units *	1	
Rate	\$0.00	
Secondary Code	6000 PVR	
Unit Type	Units	

11. Provider Documentation Type = Select Daily Attendance Log.
 a. If additional selections are needed, make those additional selections too.



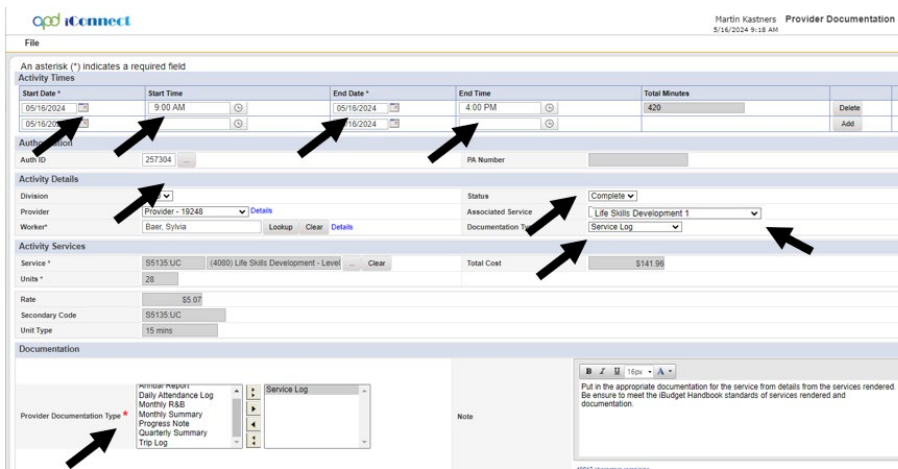
Documentation

Provider Documentation Type *

- Annual Report
- Daily Attendance Log
- Monthly R&B
- Monthly Summary
- Progress Note
- Quarterly Summary
- Trip Log

12. Note = Enter details of the services provided to the consumer and ensure to document when the individual is not in the home and receiving other services.
 a. For example: At ADT from approximately 8:00am- 3:00pm every weekday during January except for Monday 1/15/2024 where the ADT was closed for the holiday.

13. Status = Complete.



apd iConnect

File Martin Kashner Provider Documentation 3/16/2024 9:18 AM

An asterisk (*) indicates a required field

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

Auth: 257304 RA Number

Activity Details

Division: Provider - 19248 Status: Complete

Worker: Bann, Sylvia Associated Service: Life Skills Development 1

Documentation: Service Log

Activity Services

Service * S5135 UC (4080) Life Skills Development - Level Total Cost \$141.96

Units * 28

Rate \$5.07

Secondary Code S5135 UC

Unit Type 15 mins

Documentation

Provider Documentation Type *

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.

14. Click File > Save and Close Provider Documentation.

Monthly Summary

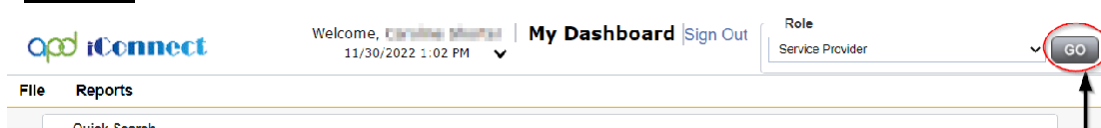
A monthly summary is a written summary of the activities that took place during each month, including the consumer's progress toward achieving goals. **Add the Monthly Summary as a separate activity using the 0000-WVR Code.**

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

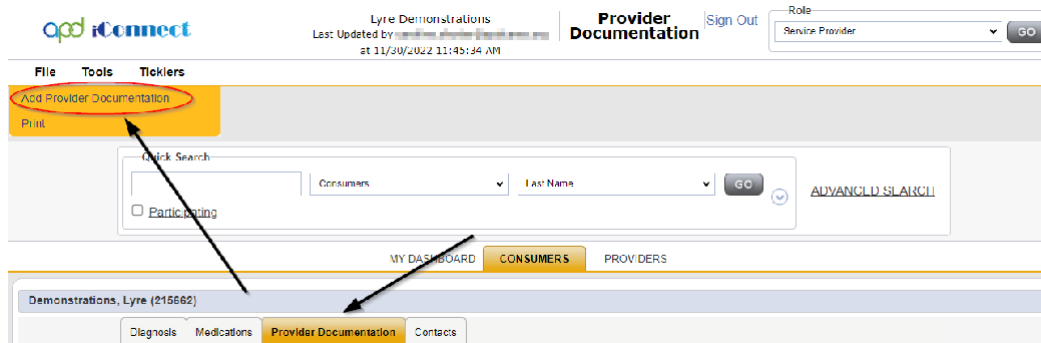
For ResHab Providers: Monthly summaries may be submitted if the provider chooses to do a monthly summary each month rather than a quarterly summary

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:

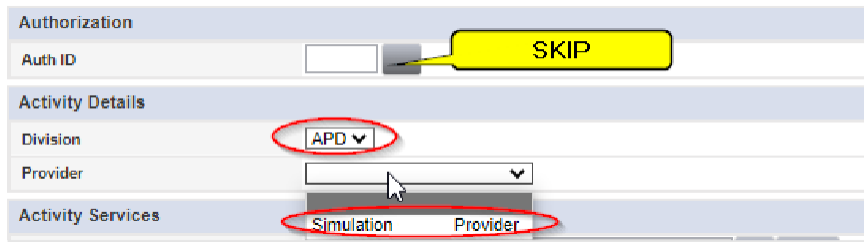
- a. Start Date: Select the Date of Service.
- b. Start Time: Select the start time of the service
- c. End Date: Select the Date of Service.
- d. End Time: Select the end time of the service
- e. Click **Add**.

4. **SKIP the AUTH ID Section**

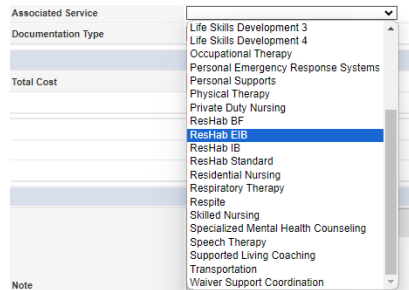
5. Since the Auth usually populates the following fields, make sure to complete the following additional sections (select from dropdown menu).

- a. Division = APD

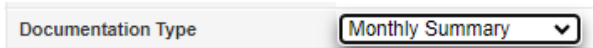
b. Provider = The organization represented



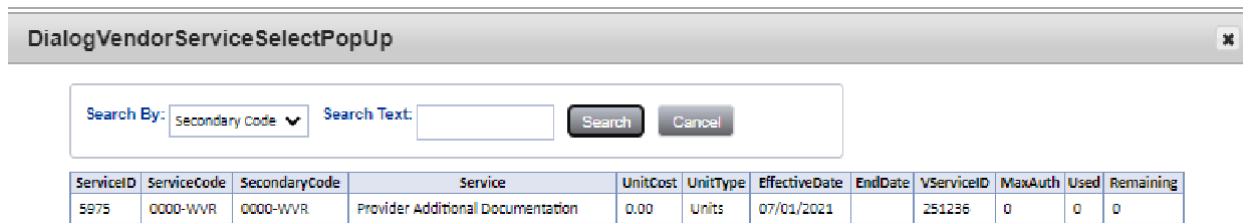
6. Associated Service can be chosen when inputting Annual Report, Quarterly Report, and any other provider documentation for quick reference in the Provider Documentation tab of the Consumer's Record. Select the appropriate service associated with the provider documentation from the drop-down menu.



7. Documentation Type choose Monthly Summary.



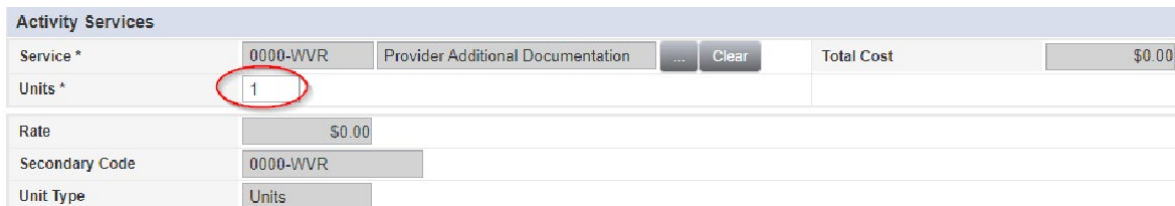
8. Click the box next to the Service field that contains an ellipsis (three dots) to display a list of services for this authorization. Select the 0000-WVR Service.



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.

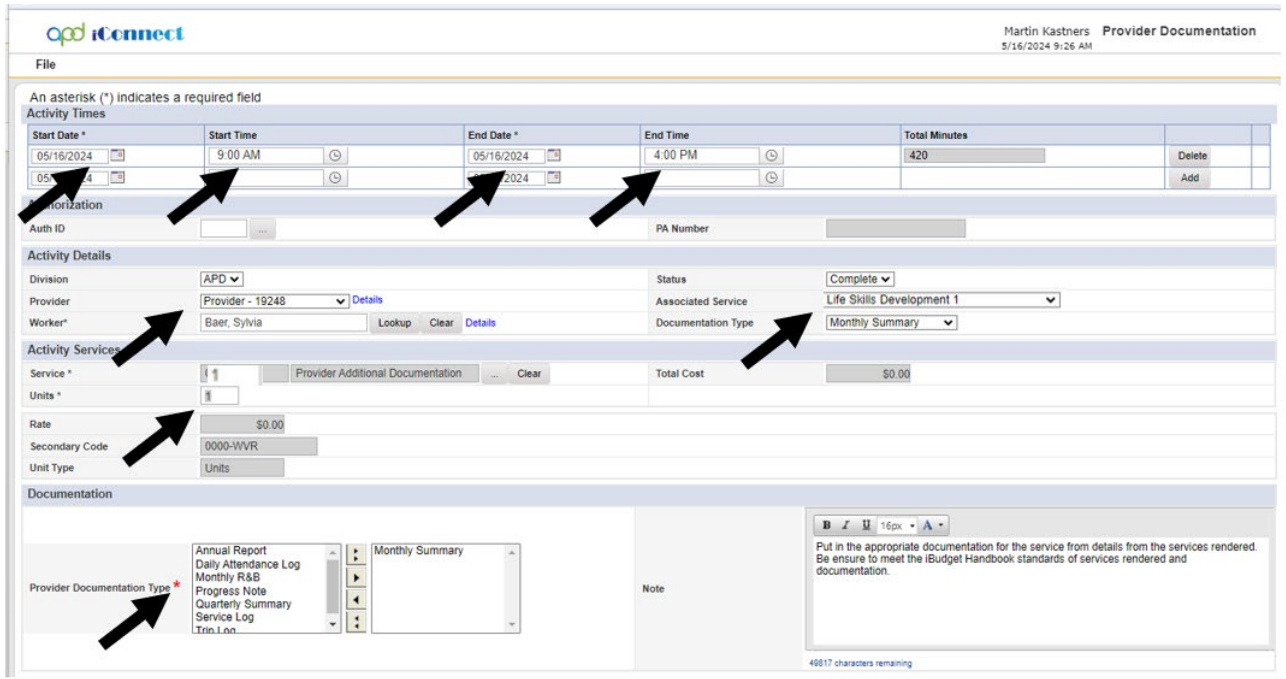


Activity Services	
Service *	0000-WVR Provider Additional Documentation ... Clear Total Cost \$0.00
Units *	1
Rate	\$0.00
Secondary Code	0000-WVR
Unit Type	Units

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.

12. Status = Complete



The screenshot shows the 'Provider Documentation' form in the APD iConnect system. The form is titled 'Provider Documentation' and includes a 'File' menu. The form is divided into several sections:

- Activity Times:** A table with columns for Start Date, Start Time, End Date, End Time, and Total Minutes. Arrows point to the Start Date, Start Time, End Date, and End Time fields.
- Authorization:** Fields for Auth ID and PA Number.
- Activity Details:** Fields for Division (APD), Provider (Provider - 19248), Worker* (Baer, Sylvia), Status (Complete), Associated Service (Life Skills Development 1), and Documentation Type (Monthly Summary). Arrows point to the Provider, Worker*, Status, and Documentation Type fields.
- Activity Services:** Fields for Service*, Units*, Rate (\$0.00), Secondary Code (0000-WVR), and Unit Type (Units). Arrows point to the Service*, Units*, Rate, and Secondary Code fields.
- Documentation:** A section for entering a note. The 'Provider Documentation Type' dropdown is set to 'Monthly Summary'. A text area for the note is visible, with a character count of 48817 characters remaining. Arrows point to the 'Provider Documentation Type' dropdown and the note text area.

13. Click File > Save and Close Provider Documentation

Quarterly Summary

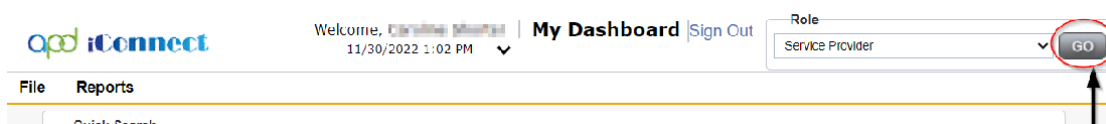
A quarterly summary is a written summary of the activities that took place during each quarter, including the consumer's progress toward achieving goals. The third quarterly summary is also the annual report. **The third quarterly summary also serves as the annual report and must include a summary of the previous three quarters.**

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

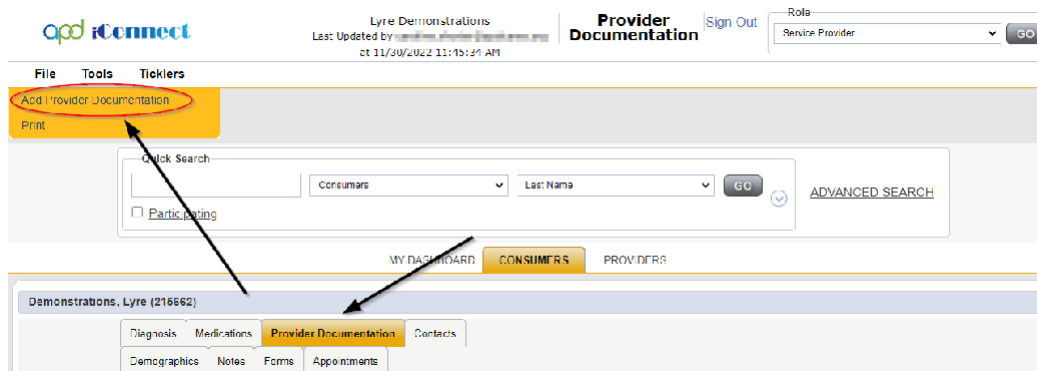
Please refer to [the Intro to completing Provider Documentation Screens with detailed images for instructions](#) on how to complete each field.

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**.



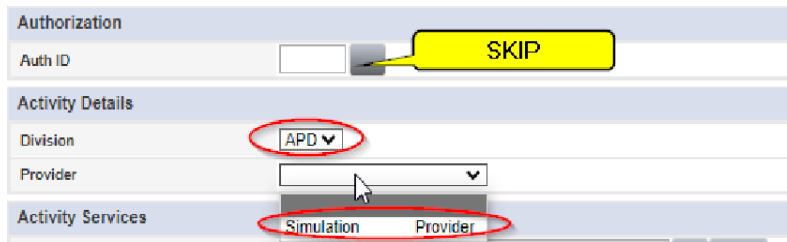
3. The Provider Documentation Details page is displayed. Update the following fields:
 - a. Start Date: Select the Date of Service.
 - b. Start Time: Select the start time of the service
 - c. End Date: Select the Date of Service.
 - d. End Time: Select the end time of the service
 - e. Click **Add**.

4. **SKIP the AUTH ID Section**

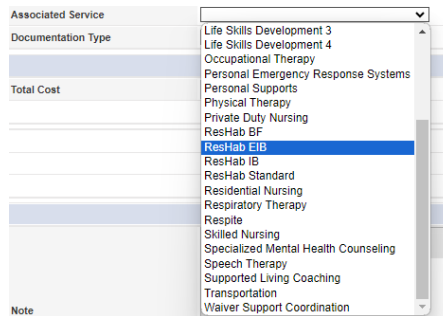
5. Since the Auth usually populates the following fields, make sure to complete the

following additional sections (select from dropdown menu).

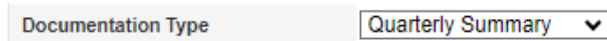
- a. Division = APD
- b. Provider = The organization represented



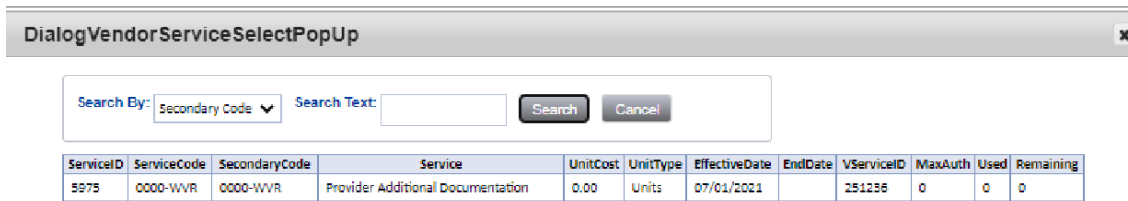
- 6. Select the appropriate service associated with the provider documentation from the drop-down menu.



- 7. Documentation Type will be Quarterly Summary.



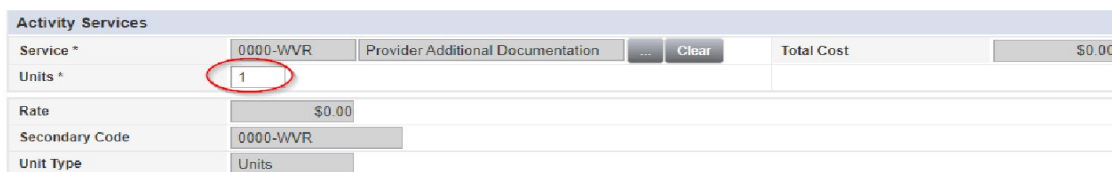
- 8. Click the box next to the Service field that contains an ellipsis (three dots) to display a list of services for this authorization. Select the 0000-WVR Service.



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		251256	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.



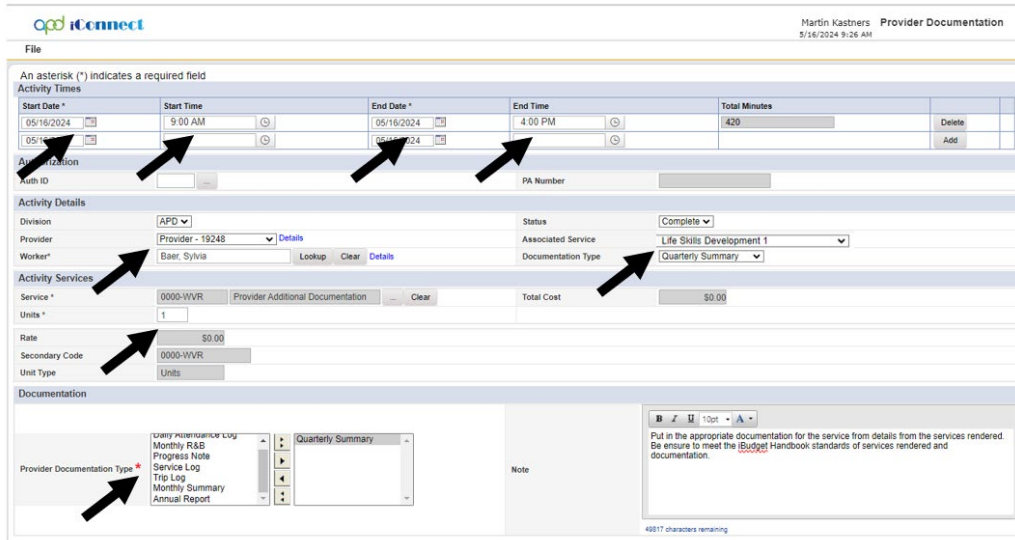
Service *	0000-WVR	Provider Additional Documentation	...	Clear	Total Cost	\$0.00
Units *	1					
Rate	\$0.00					
Secondary Code	0000-WVR					
Unit Type	Units					

- 10. Provider Documentation Type = 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.

12. Status = Complete

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



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:** A table with columns for Start Date, Start Time, End Date, End Time, and Total Minutes. Arrows point to the Start Date, Start Time, End Date, and End Time fields.
- Authorization:** Fields for Auth ID and PA Number.
- Activity Details:** Fields for Division (APD), Provider (19248), Worker (Baer, Sylvia), Status (Complete), Associated Service (Life Skills Development 1), and Documentation Type (Quarterly Summary). Arrows point to the Provider, Worker, Status, and Documentation Type fields.
- Activity Services:** Fields for Service (0000-WVR), Units (1), Rate (\$0.00), Secondary Code (0000-WVR), and Unit Type (Units). Arrows point to the Service, Units, Rate, and Secondary Code fields.
- Documentation:** A section with a 'Provider Documentation Type' dropdown menu (set to 'Quarterly Summary') and a 'Note' text area. An arrow points to the dropdown menu. The note area contains a prompt: '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.'

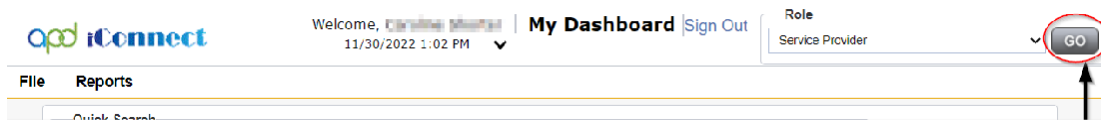
Annual Report

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.**

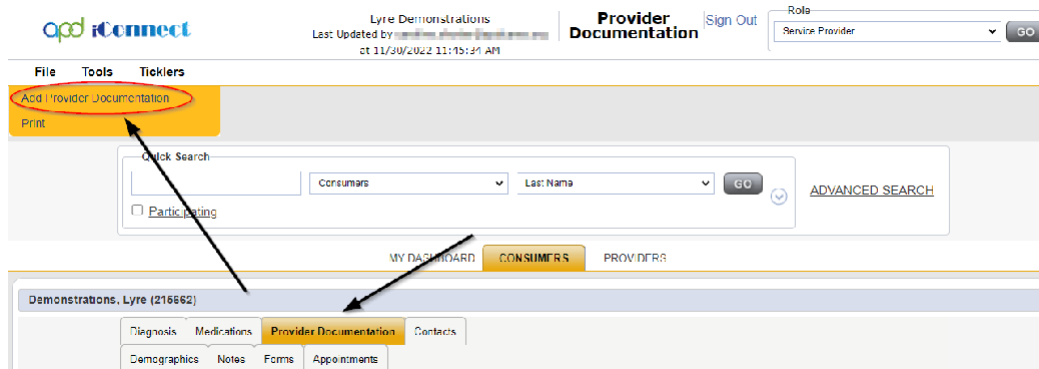
Please refer to [the Intro to completing Provider Documentation Screens with detailed images for instructions](#) on how to complete each field.

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:

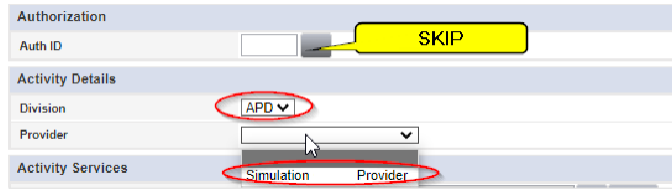
- a. Start Date: Select the Date of Service.
- b. Start Time: Select the start time of the service
- c. End Date: Select the Date of Service.
- d. End Time: Select the end time of the service
- e. Click **Add**.

4. **SKIP the AUTH ID Section**

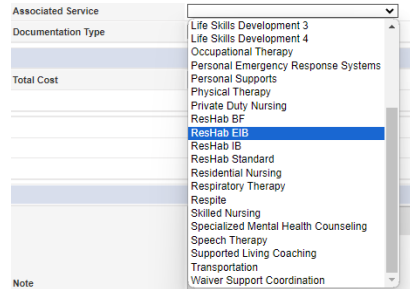
5. Since the Auth usually populates the following fields, make sure to complete the following additional sections (select from dropdown menu).

- a. Division = APD

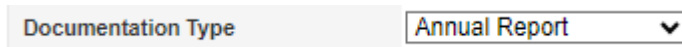
b. Provider = The organization represented



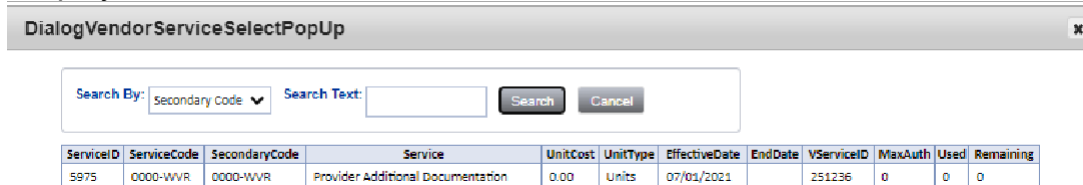
6. Select the appropriate service associated with the provider documentation from the drop-down menu.



7. Documentation Type will be Annual Report.



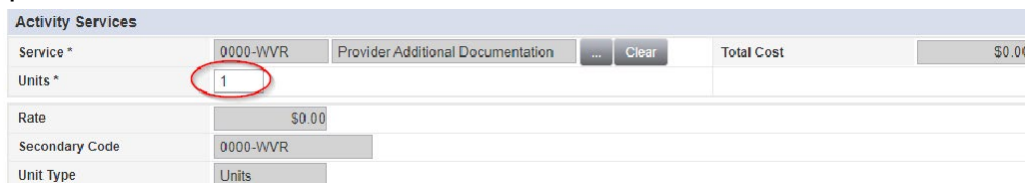
8. Click the box next to the Service field that contains an ellipsis (three dots) to display a list of services for this authorization. Select the 0000-WVR Service.



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	...
Units *	1		Clear
Rate	\$0.00		Total Cost
Secondary Code	0000-WVR		\$0.00
Unit Type	Units		

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.

12. Status = Complete


Martin Kastners Provider Documentation
5/16/2024 9:26 AM

File

An asterisk (*) indicates a required field

Activity Times

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

Authorization

Auth ID: PA Number:

Activity Details

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

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

Documentation

Provider Documentation Type *:

 Daily Attendance Log

 Monthly R&B

 Progress Note

 Quarterly Summary

 Service Log

 Trip Log

 Monthly Summary

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.

49817 characters remaining

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