

## 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.

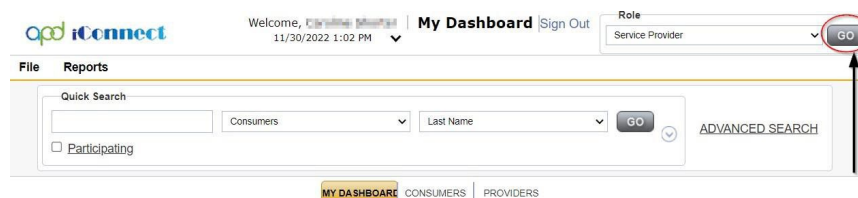
This job aid will encompass using iConnect to record services using the Provider Documentation Tab of the Consumer's record. If services are required to use the EVV system, this aid will not address those tasks, please refer to the [EVV Information and Training Material](#) website.

**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

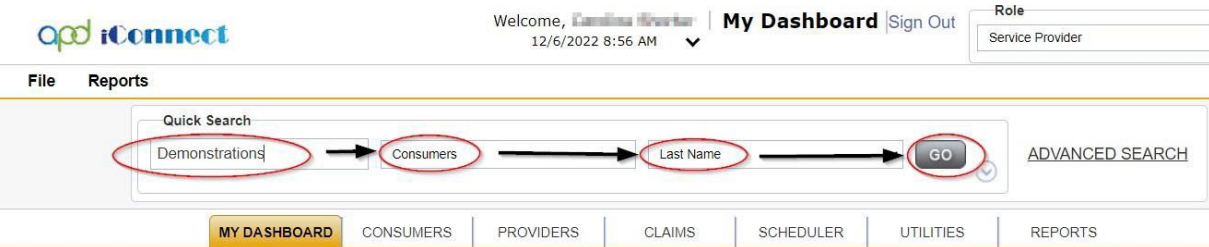
1. To begin, log into iConnect and set Role = **Service Provider** or **Service Provider Worker**. Click **Go**.



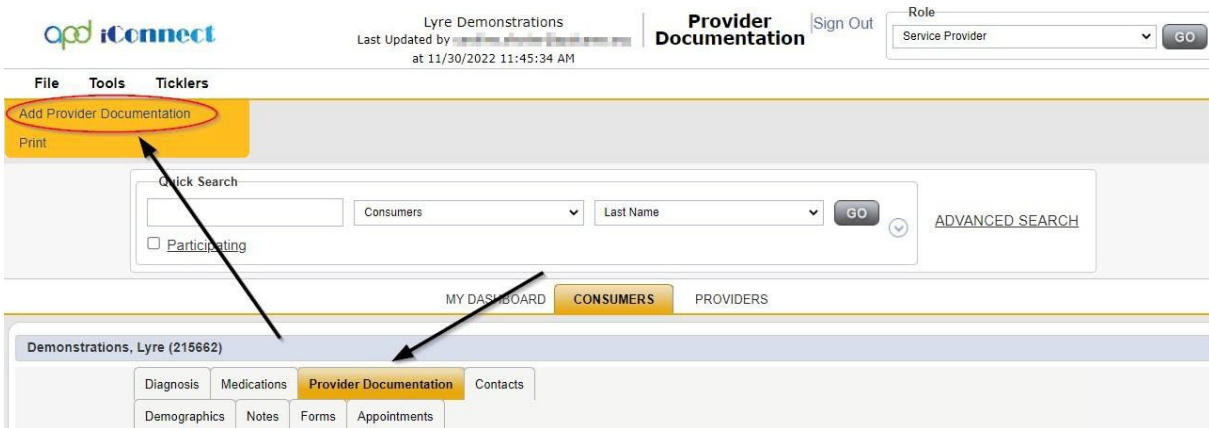
The screenshot shows the iConnect dashboard interface. At the top left is the iConnect logo. The user is logged in as 'Welcome, Caroline [last name]' on 11/30/2022 at 1:02 PM. The main navigation area includes 'My Dashboard' and 'Sign Out'. A dropdown menu for 'Role' is open, showing 'Service Provider' selected. A red circle highlights the 'GO' button next to the role dropdown. Below this is a search bar with 'Quick Search' and 'Participating' checkboxes. The search criteria are set to 'Consumers' and 'Last Name'. A 'GO' button is next to the search criteria, and an 'ADVANCED SEARCH' link is to the right. At the bottom, there are tabs for 'MY DASHBOARD', 'CONSUMERS', and 'PROVIDERS'.

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"

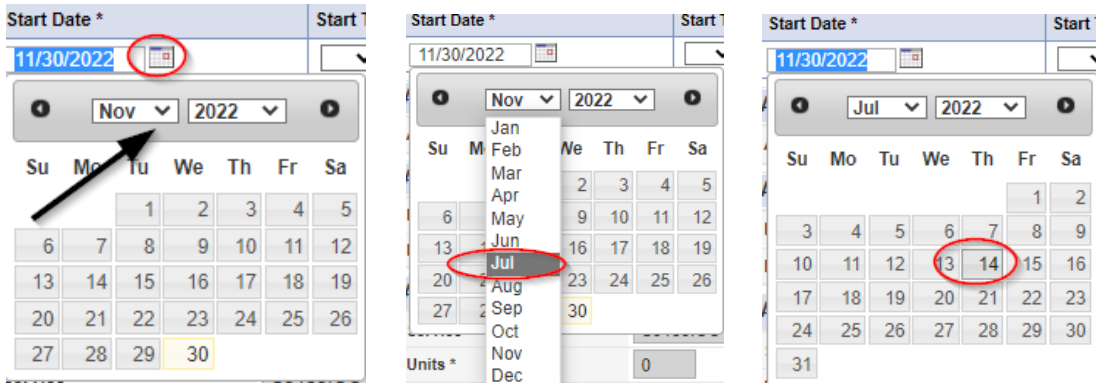


3. Click the **Provider Documentation** tab > click **File > Add Provider Documentation**.

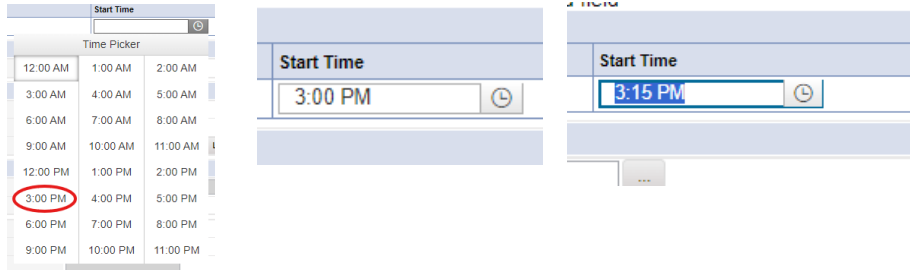


4. The Provider Documentation Details page is displayed. Update the following fields:

- 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**.



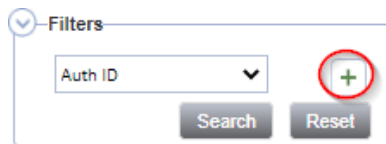
Start Date *	Start Time	End Date *	End Time	Total Minutes	
07/14/2022	3:00 PM	07/14/2022	3:15 PM		Add

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

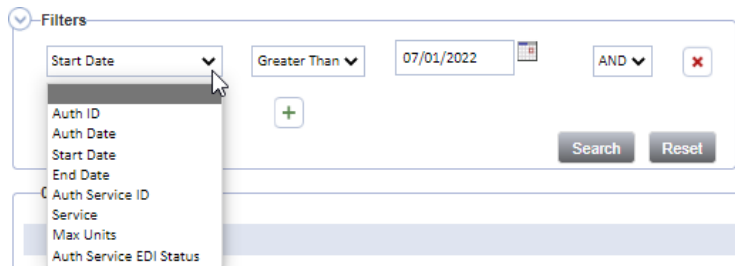
5. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations. There are specific circumstances in which you may skip this step, but that will be listed in the documentation specific instructions.



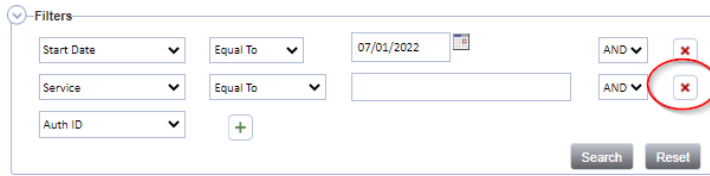
- a. Using the Filter Options can assist with locating the necessary Auth ID.
- b. Use the Green + to add filters.



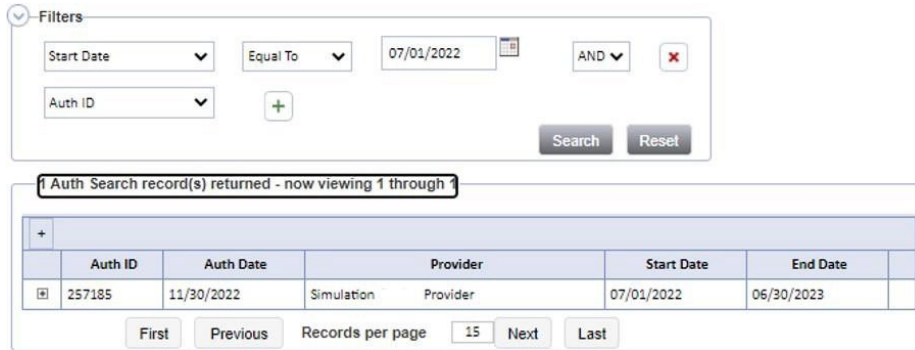
- c. Make the appropriate selections from the dropdown menus.



- d. Use the Red X to remove filters.

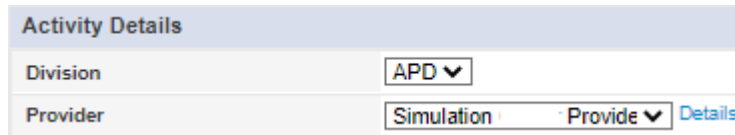


- e. Click the Search button.
- 6. Click the Authorization. The Authorization ID is populated on the Provider Documentation details page.

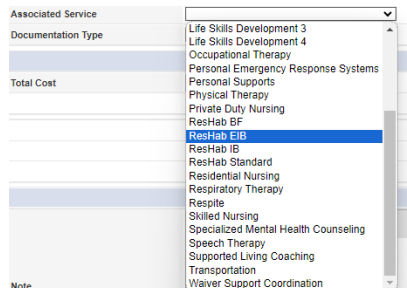


Auth ID	Auth Date	Provider	Start Date	End Date
257185	11/30/2022	Simulation Provider	07/01/2022	06/30/2023

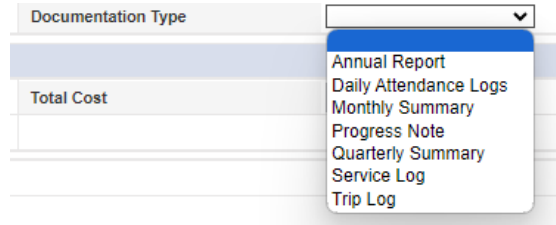
- 7. Verify that the Division and Provider information have been populated. If they are not, use the dropdown menus to make the appropriate selections.



- 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.



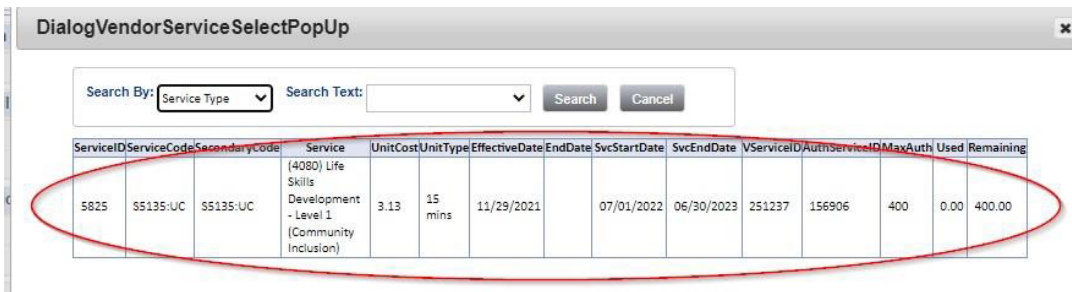
9. Documentation Type can be chosen when inputting Annual Report, Quarterly Report and any other provider documentation for quick reference in the Provider Documentation tab of the Consumer’s Record. Select the appropriate documentation type associated with the provider documentation from the drop-down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



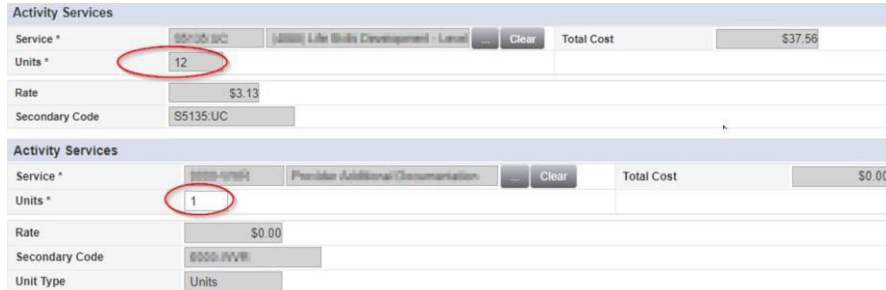
- a. Select the Service.



- 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 *	85135.UC	Life Skills Development - Lunch	Clear	Total Cost	\$37.56
Units *	12				
Rate	\$3.13				
Secondary Code	85135.UC				

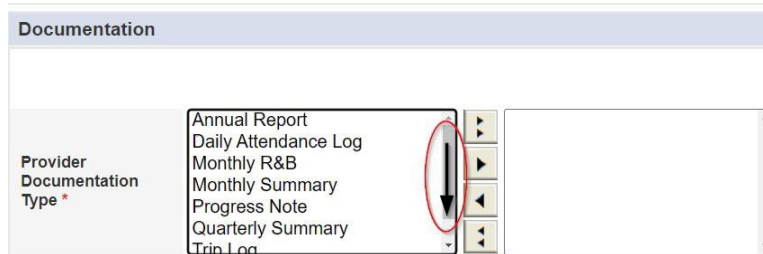
  

Activity Services

Service *	8500.IV.W	Provider Additional Documentation	Clear	Total Cost	\$0.00
Units *	1				
Rate	\$0.00				
Secondary Code	8500.IV.W				
Unit Type	Units				

12. Provider Documentation Type = Select as needed.

- a. Use the scrollbar to see all the selections.

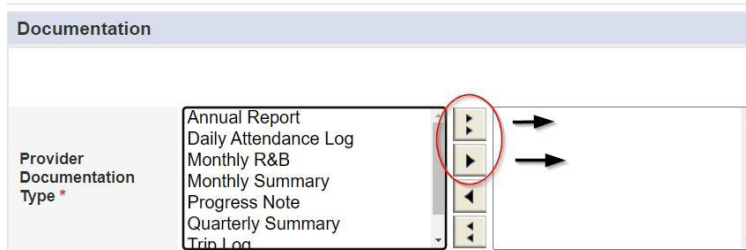


Documentation

Provider Documentation Type \*

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

- 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.

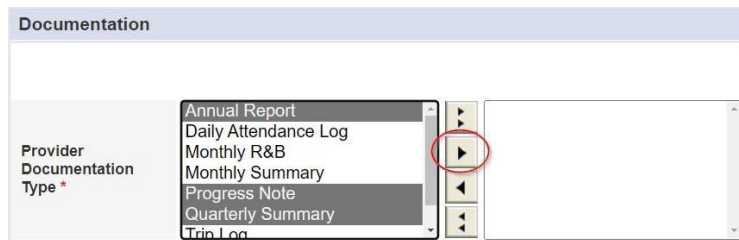


Documentation

Provider Documentation Type \*

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

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

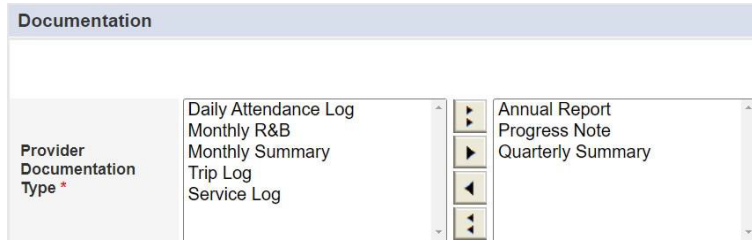


Documentation

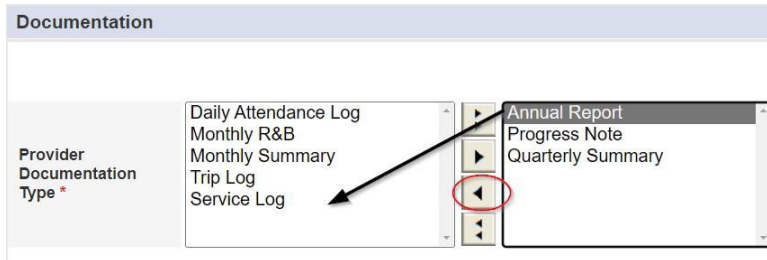
Provider Documentation Type \*

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

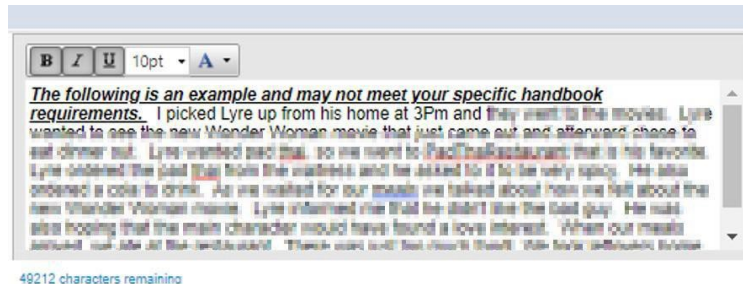
- d. Selections should be moved to the box on the right.



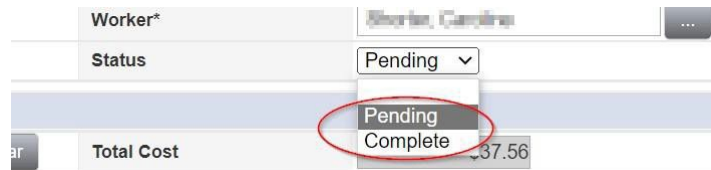
- e. If incorrect selections were made, use the caret pointing to the left to move those selections back into the original menu on the left.
  - i. Single caret moves the selected options.
  - ii. Double carets move all the items.



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 Progress Note

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

- Special Medical Home Care
- Supported Living Coaching
- Dietitian Services
- Occupational Therapy
- Physical Therapy
- Residential Nursing
- Respiratory Therapy
- Skilled Nursing
- Speech Therapy
- Specialized Mental Health Counseling

*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 Consumer's record and click the **Provider Documentation** tab > click **File > Add Provider Documentation**.

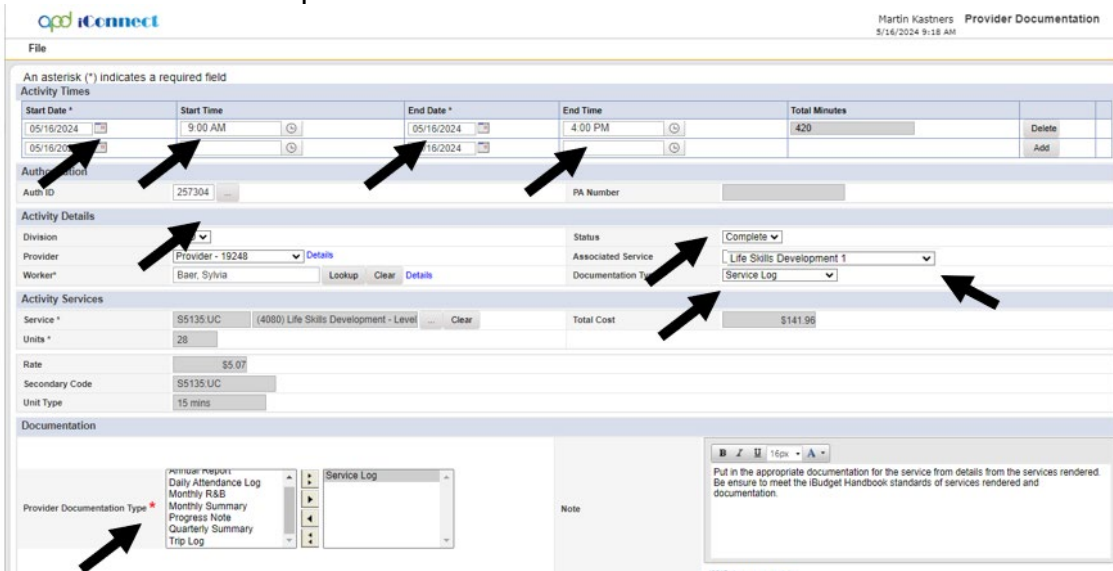


3. The Provider Documentation Details page is displayed. Update the following fields:
  - a. Start Date: Select the Date of Service.
  - b. Start Time: Select the start time of the service
  - c. End Date: Select the Date of Service.
  - d. End Time: Select the end time of the service
  - e. Click **Add**.

***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 = Progress Note
  - a. If additional selections are needed, make those additional selections too, such as the Quarterly Summary or Annual Report (see next sections for more information)
11. Note - Enter details of the services provided to the consumer.
10. Status = Complete.



The screenshot shows the 'iConnect' Provider Documentation form. The form is titled 'Martin Kastners Provider Documentation' and dated '5/16/2024 9:18 AM'. It contains several sections: 'Activity Times', 'Authorization', 'Activity Details', 'Activity Services', and 'Documentation'. Arrows point to the following fields: 'Start Date', 'Start Time', 'End Date', 'End Time', 'Total Minutes', 'Auth ID', 'PA Number', 'Division', 'Provider', 'Worker', 'Status', 'Associated Service', 'Documentation Type', 'Service', 'Units', 'Rate', 'Secondary Code', 'Unit Type', and 'Provider Documentation Type'. The 'Documentation' section includes a 'Note' field with a text area and a 'Service Log' dropdown menu.

11. 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. There are two options to enter the Monthly Summary:

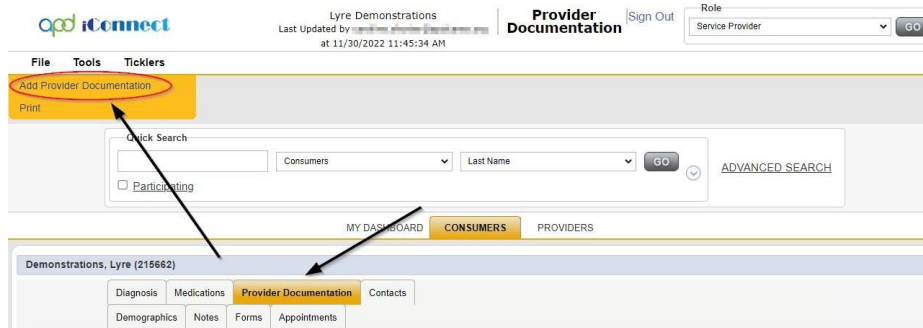
**First Option:** Include the Monthly Summary in the final Progress Note for the month.

**Second Option:** 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.*

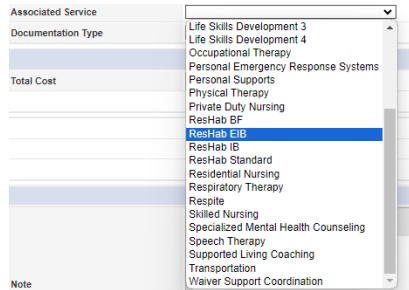
Include the Monthly Summary in the final Progress Note for the Month:

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**.

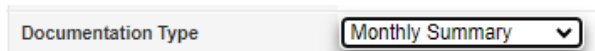


3. The Provider Documentation Details page is displayed. Update the following fields:
  - a. Start Date: Select the Date of Service.
  - b. Start Time: Select the start time of the service
  - c. End Date: Select the Date of Service.
  - d. End Time: Select the end time of the service
  - e. Click **Add**.
4. 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.

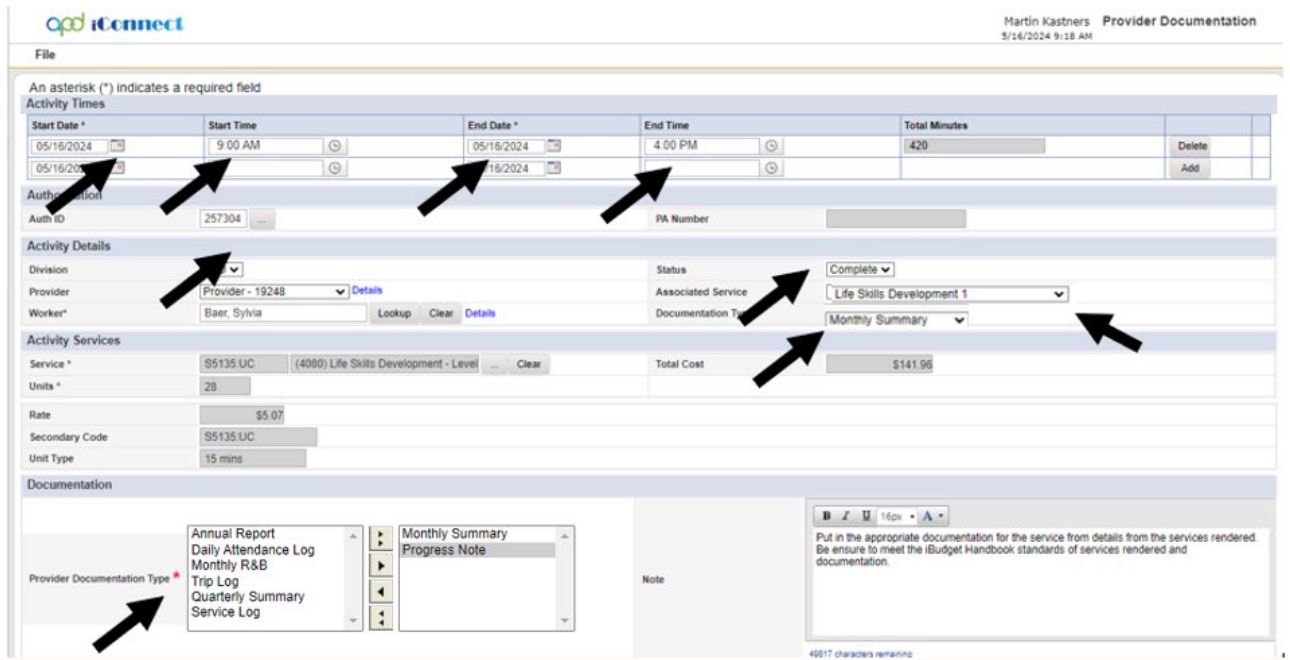
- a. The Authorization ID will populate on the Provider Documentation details page.
6. Select the appropriate service associated with the provider documentation from the drop-down menu.



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 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 = Service Log or Progress Note
  - a. If additional selections are needed, make those additional selections too, such as:
    - i. Monthly Summary
    - ii. Annual Report
11. Note - Enter details of the services provided to the consumer and the summary of the activities that took place during the month, including the consumer's progress toward achieving goals, in accordance with the iBudget handbook.



The screenshot shows the 'Provider Documentation' form in the iConnect system. The form is divided into several sections: Activity Times, Authentication, Activity Details, Activity Services, and Documentation. Arrows point to the following fields:

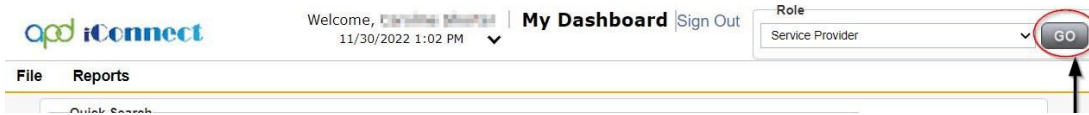
- Activity Times:** Start Date, Start Time, End Date, and End Time.
- Authentication:** Auth ID and PA Number.
- Activity Details:** Status (set to Complete), Associated Service (Life Skills Development 1), and Documentation Type (Monthly Summary).
- Activity Services:** Service (S5135 UC), Units (29), Rate (\$5.07), and Total Cost (\$141.96).
- Documentation:** Provider Documentation Type (Monthly Summary) and the Note field.

12. Status = Complete.

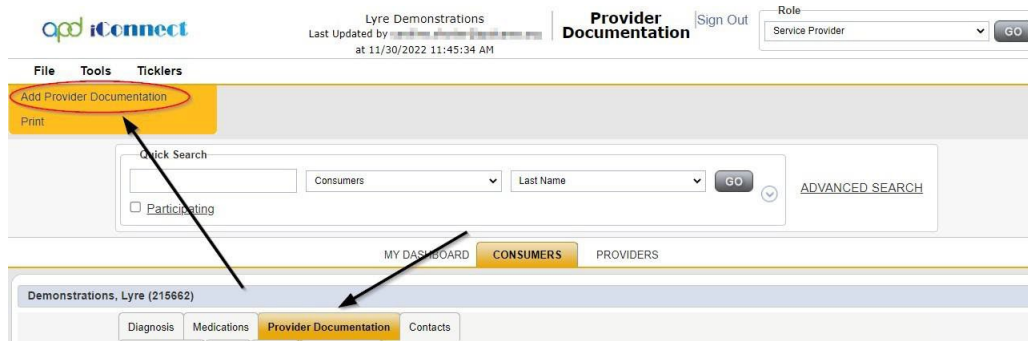
13. Click **File > Save and Close Provider Documentation**

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**.



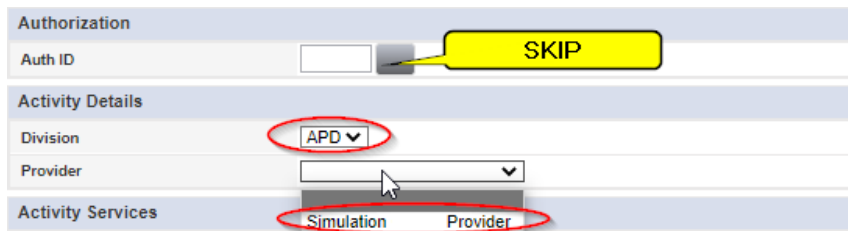
2. Navigate to the Consumer's record and click the **Provider Documentation** tab > click **File > Add Provider Documentation**.



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



- 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.*

- 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					

- Provider Documentation Type = Monthly Summary

- 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.

- Status = Complete

**APD iConnect** Martin Kastners Provider Documentation  
3/16/2024 9:26 AM

File

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	1420	
05/16/2024		05/16/2024			Add

**Authorization**

Auth ID  PA Number

**Activity Details**

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

**Activity Services**

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

**Documentation**

Provider Documentation Type: Annual Report Daily Attendance Log Monthly R&B Progress Note Quarterly Summary Service Log Trn Log Monthly Summary

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

- 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. There are two options to enter the Quarterly Summary:

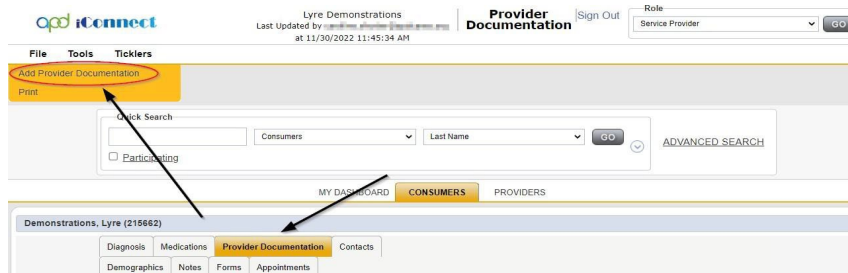
**First Option:** Include the Quarterly Summary in the last Progress Note for the Quarter.

**Second Option:** 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.](#)*

Include the Quarterly Summary in the final Progress Note for the Quarter:

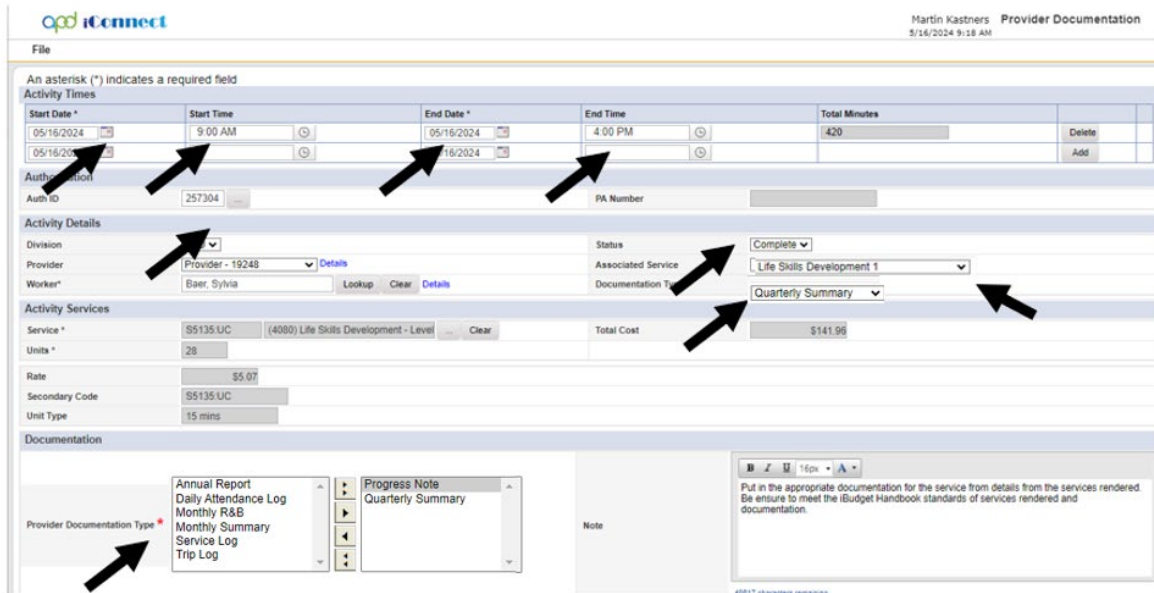
1. To begin, log into iConnect and set Role = **Service Provider** or **Service Provider Worker**. Click **Go**.
2. Navigate to the Consumer's record and click the **Provider Documentation** tab > click **File > Add Provider Documentation**.



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. 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 = Service Log or Progress Note
  - a. If additional selections are needed, make those additional selections too, such as:
    - i. Quarterly Summary
    - ii. Annual Report
11. Note - Enter the details of the services provided to the consumer and 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.



The screenshot shows the 'Provider Documentation' form in the iConnect system. The form is divided into several sections: 'Activity Times', 'Authorization', 'Activity Details', 'Activity Services', and 'Documentation'. Arrows indicate the following fields and their values:

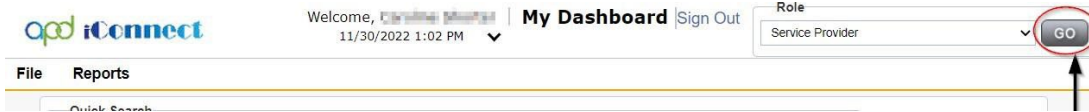
- Activity Times:** Start Date (05/16/2024), Start Time (9:00 AM), End Date (05/16/2024), End Time (4:00 PM), Total Minutes (420).
- Authorization:** Auth ID (257304), PA Number.
- Activity Details:** Division, Provider (19248), Worker (Baer, Sylvia), Status (Complete), Associated Service (Life Skills Development 1), Documentation Type (Quarterly Summary).
- Activity Services:** Service (S5135.UC (4080) Life Skills Development - Level), Units (28), Rate (\$5.07), Secondary Code (S5135.UC), Unit Type (15 mins), Total Cost (\$141.96).
- Documentation:** Provider Documentation Type (dropdown menu open showing options like Annual Report, Daily Attendance Log, Monthly R&B, Monthly Summary, Service Log, Trip Log).

11. Status = Complete

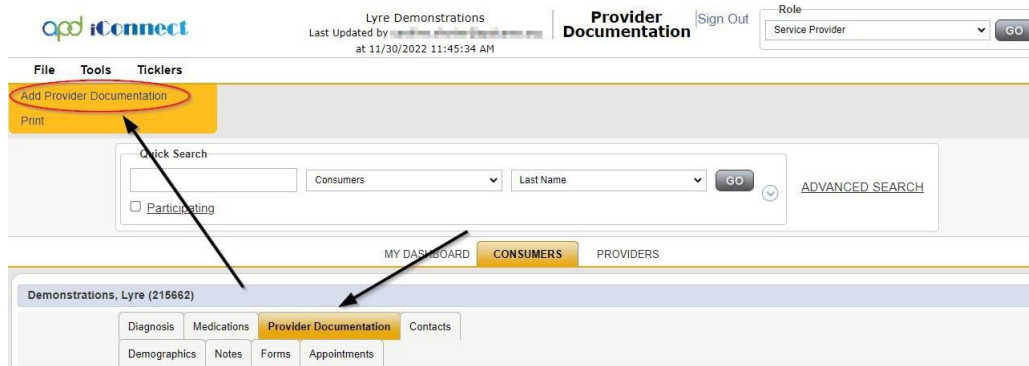
12. Click **File > Save and Close Provider Documentation.**

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**.



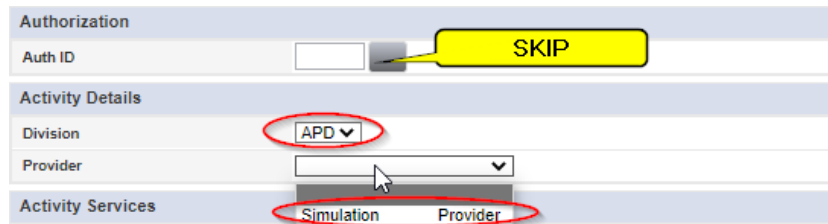
2. Navigate to the Consumer's record and click the **Provider Documentation** tab > click **File > Add Provider Documentation**.



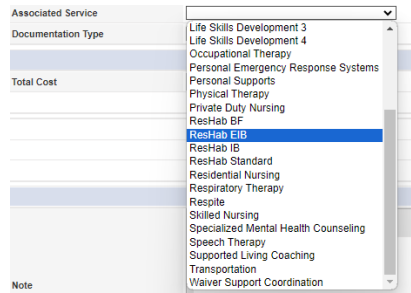
3. The Provider Documentation Details page is displayed. Update the following fields:
  - a. Start Date: Select the Date of Service.
  - b. Start Time: Select the start time of the service
  - c. End Date: Select the Date of Service.
  - d. End Time: Select the end time of the service
  - e. Click **Add**.

**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 choose Quarterly Summary.

Documentation Type 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.

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.


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 = 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


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File

An asterisk (\*) indicates a required field

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  
 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

**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 iBudget Handbook standards of services rendered and documentation.  
 4917 characters remaining

13. 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.

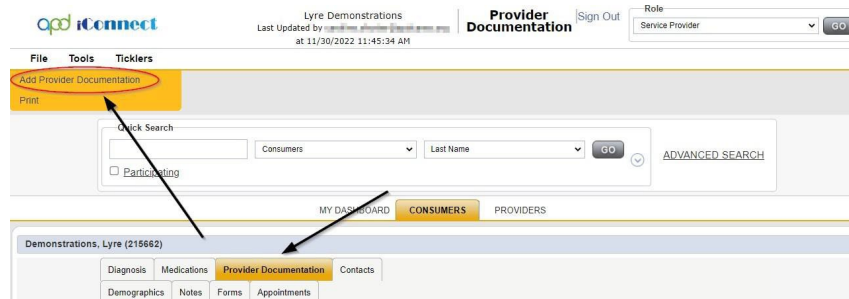
**First Option:** Include the Annual Report in the last Progress Note for the year.

**Second Option:** 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.](#)*

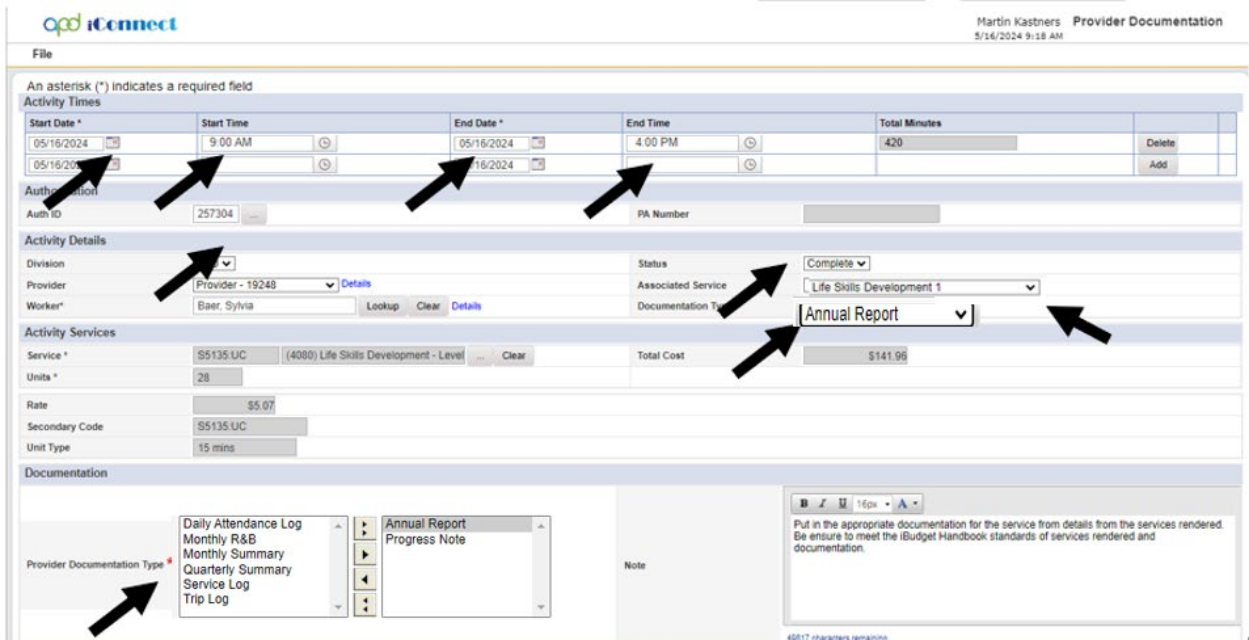
Include the Annual Report in the final Progress Note for the year:

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. 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 = Service Log or Progress Note
  - a. If additional selections are needed, make those additional selections too, such as:
    - i. Annual Report
11. Note - Enter details of the services provided to the consumer and 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.



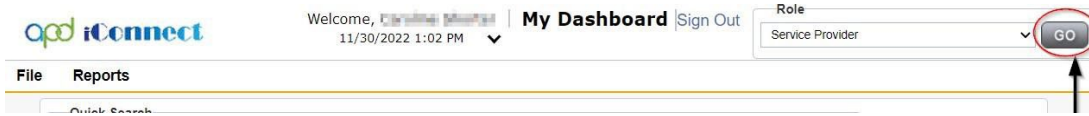
The screenshot shows the 'Provider Documentation' form in the 'apod iConnect' system. The form is titled 'Provider Documentation' and shows various fields for activity times, details, services, and documentation. Arrows point to specific fields: Start Date, Start Time, End Date, End Time, Total Minutes, Auth ID, PA Number, Status, Associated Service, Documentation Type, Service, Units, Rate, Secondary Code, Unit Type, and Provider Documentation Type. The Documentation Type dropdown is set to 'Annual Report'.

12. Status = Complete

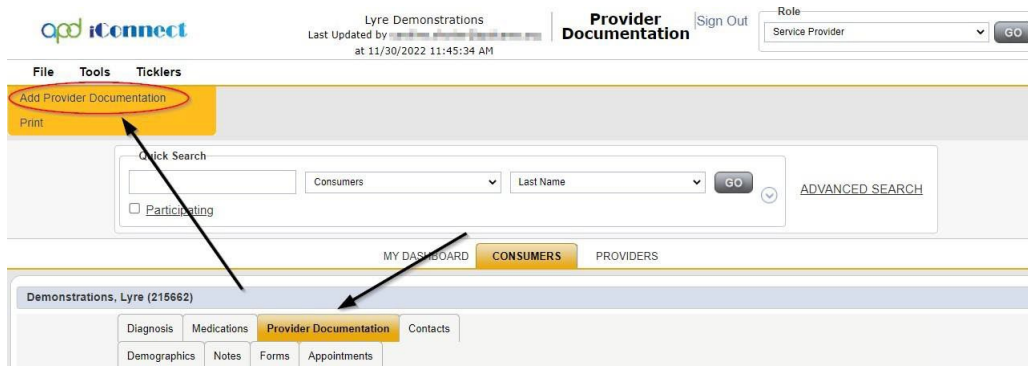
13. Click **File > Save and Close Provider Documentation.**

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**.



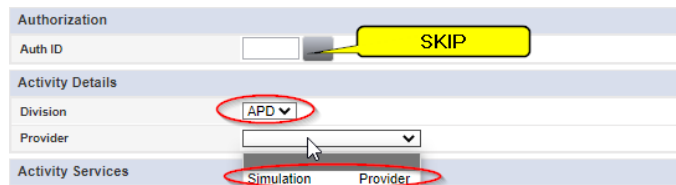
3. The Provider Documentation Details page is displayed. Update the following fields:

- 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).

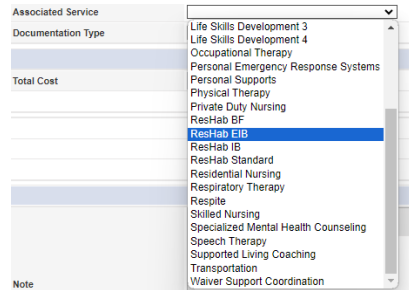
- a. Division = APD
- b. Provider = The organization represented





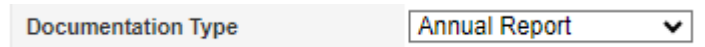
## Document Services using the Provider Documentation tab

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



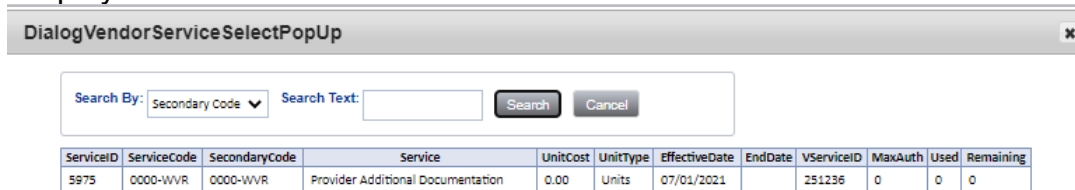
The screenshot shows a form with a dropdown menu for 'Associated Service'. The menu is open, displaying a list of services. 'ResHab EIB' is highlighted in blue. Other visible services include Life Skills Development 3, Life Skills Development 4, Occupational Therapy, Personal Emergency Response Systems, Personal Supports, Physical Therapy, Private Duty Nursing, ResHab BF, ResHab IB, ResHab Standard, Residential Nursing, Respiratory Therapy, Respite, Skilled Nursing, Specialized Mental Health Counseling, Speech Therapy, Supported Living Coaching, Transportation, and Waiver Support Coordination.

7. Documentation Type will be Annual Report.



The screenshot shows a form field labeled 'Documentation Type' with a dropdown menu. The dropdown is open, and 'Annual Report' is selected.

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.

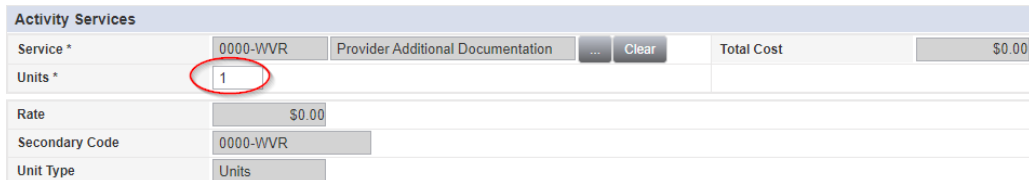


The screenshot shows a dialog box titled 'DialogVendorServiceSelectPopUp'. It has a search bar with 'Secondary Code' selected and a search text field. Below the search bar is a table with the following data:

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.



The screenshot shows a table titled 'Activity Services'. The table has the following data:


Service *	ServiceCode	SecondaryCode	Service	UnitCost	UnitType	EffectiveDate	EndDate	VServiceID	MaxAuth	Used	Remaining
0000-WVR	0000-WVR	0000-WVR	Provider Additional Documentation	0.00	Units	07/01/2021		251236	0	0	0

The 'Units' field in the first row is circled in red and contains the number '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.

12. Status = Complete


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

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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  
 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

**Documentation**

Provider Documentation Type\*: 
  
 Daily Attendance Log
   
 Monthly R&B
   
 Progress Note
   
 Quarterly Summary
   
 Service Log
   
 Trip Log
   
 Monthly Summary

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.

40817 characters remaining

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