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.

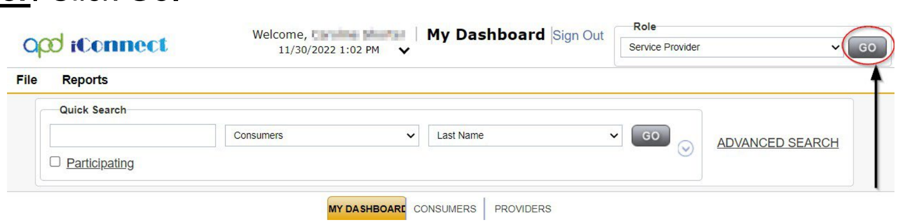
This job aid will encompass using iConnect to record services using the Provider Documentation Tab of the Consumer's record. If services are required to use the EVV system, this aid will not address those tasks, please refer to the EVV Information and Training Material website.

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

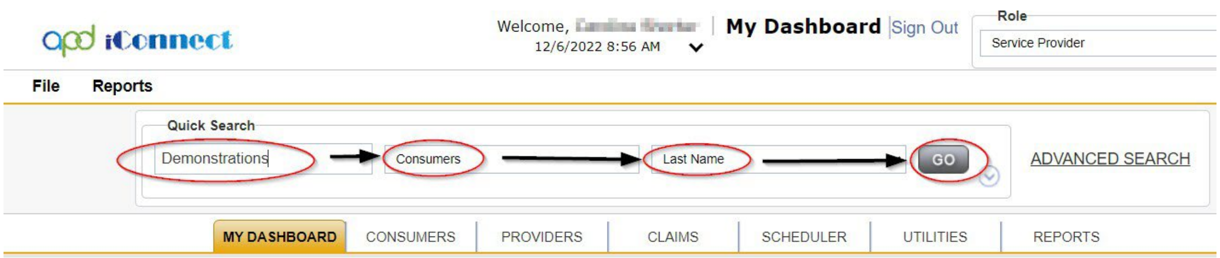
1. To begin, log into iConnect and set Role = **Service Provider** or **Service Provider Worker**. Click **Go.**



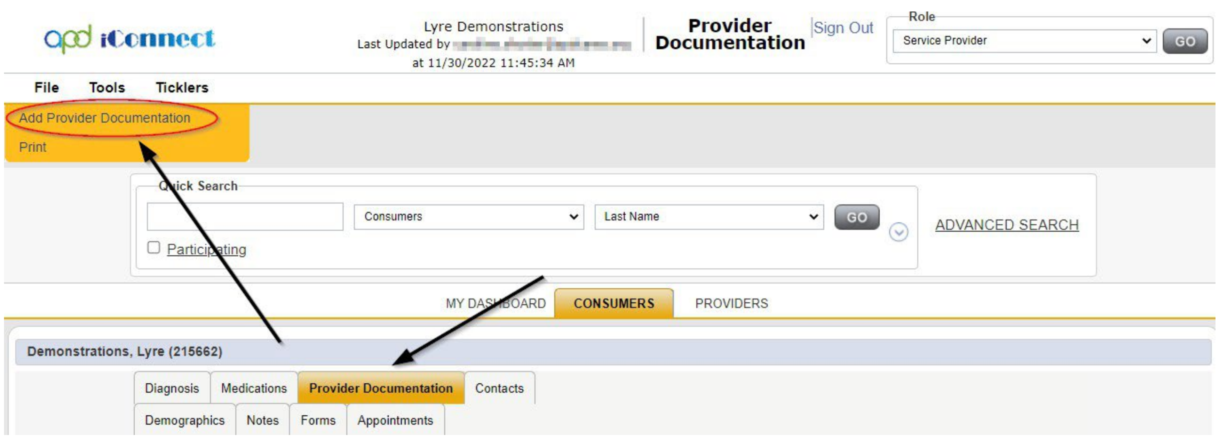
2. Navigate to the Consumer's record.

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

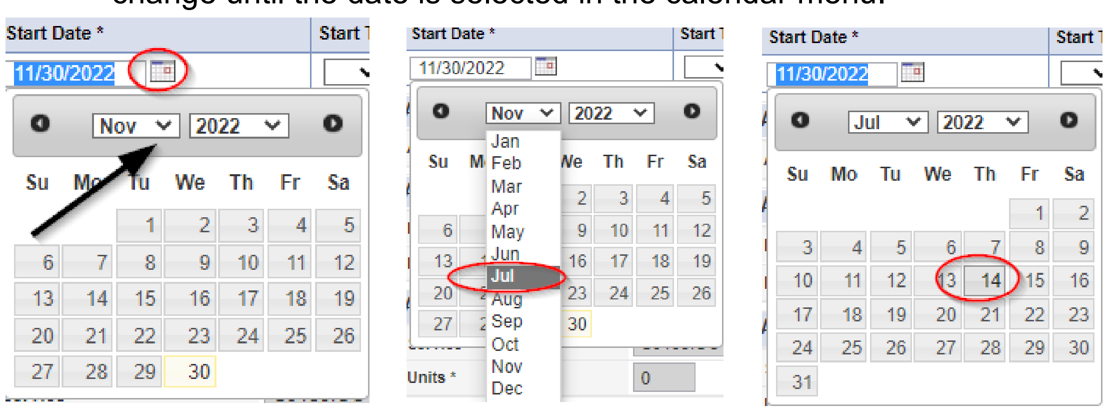


3. Click the **Provider Documentation** tab > click **File** > **Add Provider Documentation.**

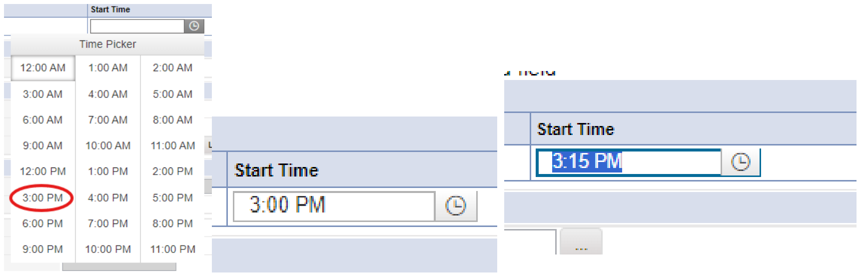


4. The Provider Documentation Details page is displayed. Update the following fields:

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.



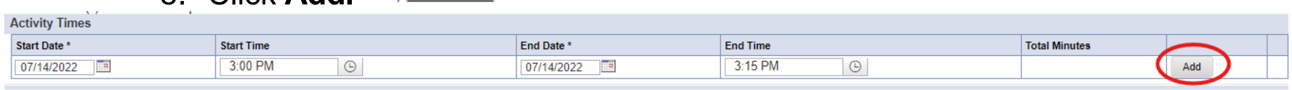
b. Start Time: Use the Clock icon to make the selections. Select the Hour with the correct AM/PM and then type in the Minutes.



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.** 

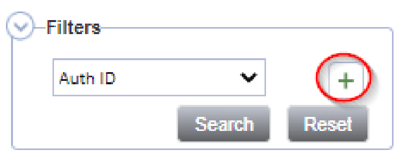


Notice a new line that appears for dates and times, do not add a second date unless instructed otherwise.

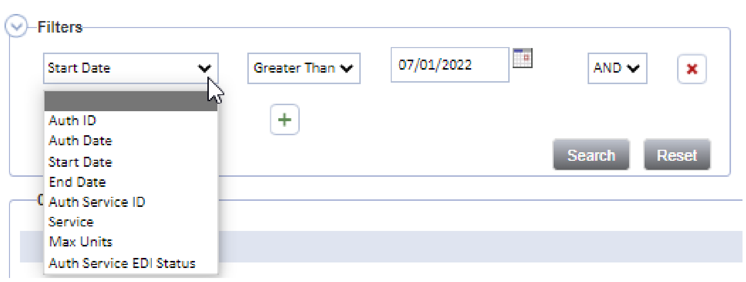
5. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations. There are specific circumstances in which you may skip this step, but that will be listed in the documentation specific instructions.

a. Using the Filter Options can assist with locating the necessary Auth ID.

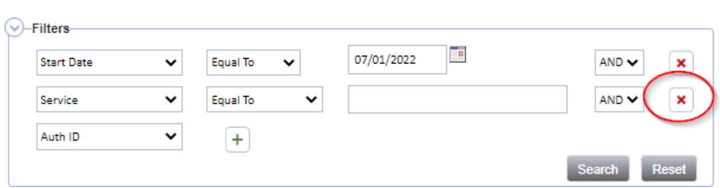
b. Use the Green + to add filters.



c. Make the appropriate selections from the dropdown menus.

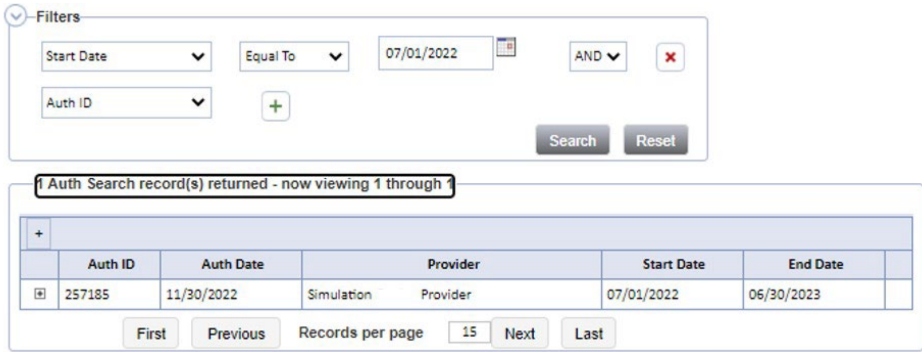


d. Use the Red X to remove filters.

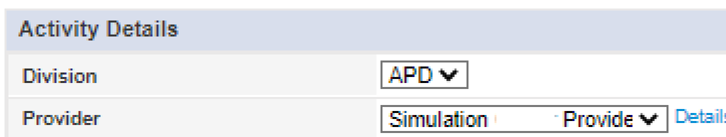


   e. Click the Search button.

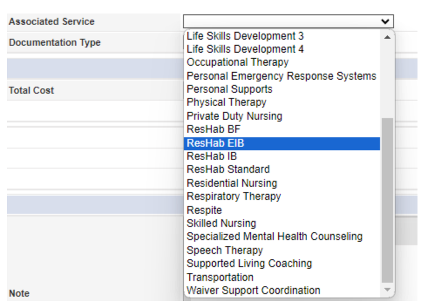
6. Click the Authorization. The Authorization ID is populated on the Provider Documentation details page.



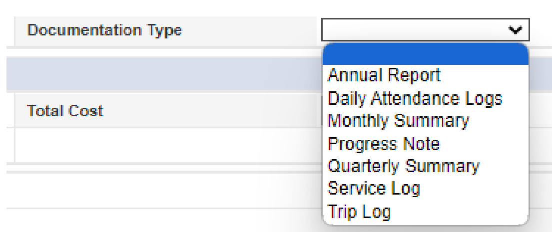
7. Verify that the Division and Provider information have been populated. If they are not, use the dropdown menus to make the appropriate selections.



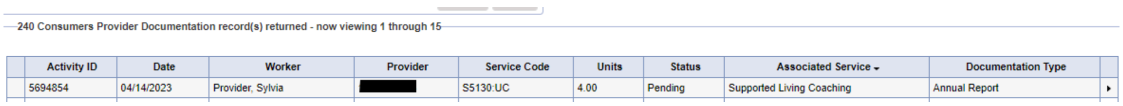
8. Associated Service can be chosen when inputting Annual Report, Quarterly Report, and any other provider documentation for quick reference in the Provider Documentation tab of the Consumer's record. Select the appropriate service associated with the provider documentation from the drop-down menu.



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.

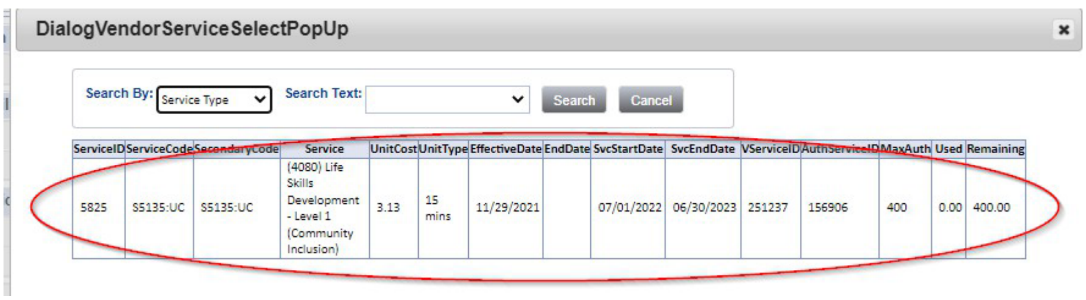


Here is an example of the list grid view of the Provider Documentation in the Consumer's Record with the Associated Service and Documentation Type utilized.



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

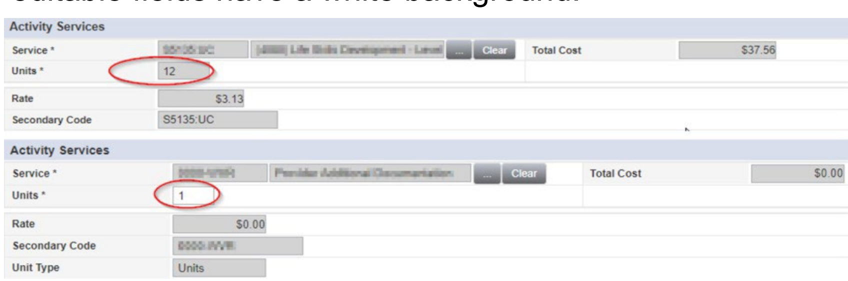
   a. Select the Service.



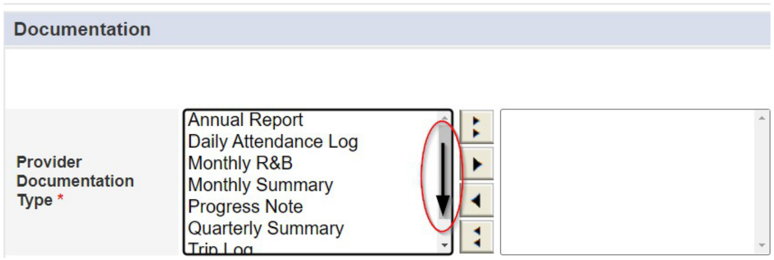
   b. The Activity Services details are populated on the Provider Documentation details page.

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.

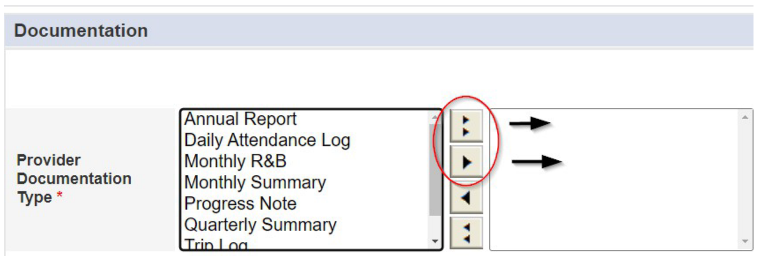
   a. In the first example, the units cannot be changed. In the second example, Units were updated. Notice the difference in the shade of the boxes, editable fields have a white background.



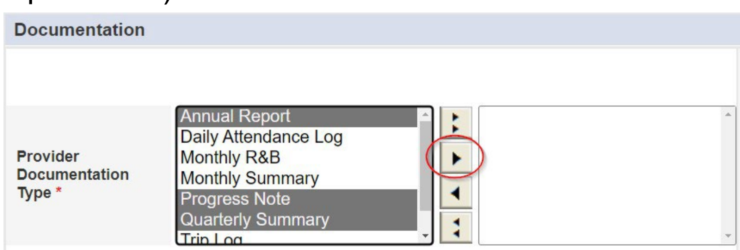
12. Provider Documentation Type = Select as needed.
    a. Use the scrollbar to see all the selections.



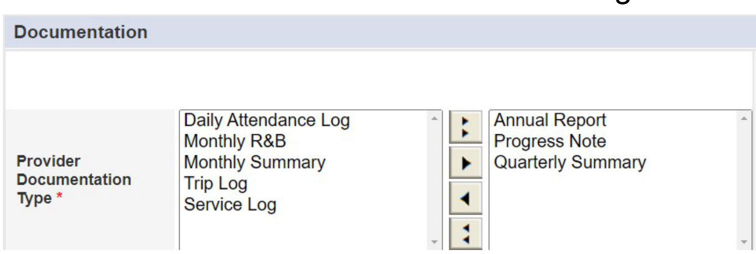
    b. The caret pointing to the right will move selections to the box on the right.
        i. Single caret moves the selected options.
        ii. Double carets move all the items.



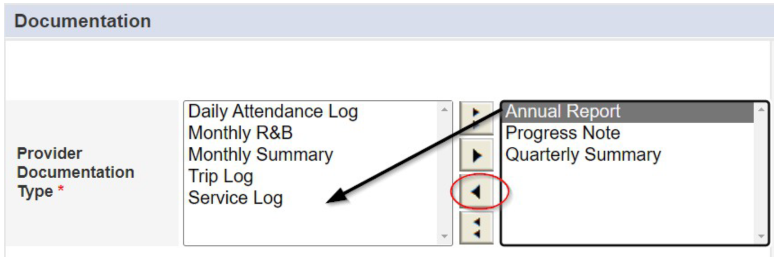
    c. Ctrl + Mouse Clicks can be used to make multiple selections at one time (example below).



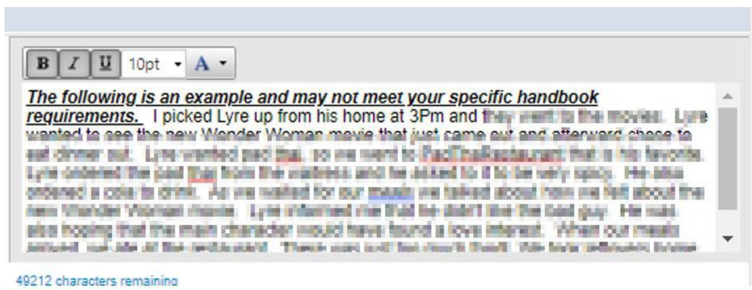
    d. Selections should be moved to the box on the right.



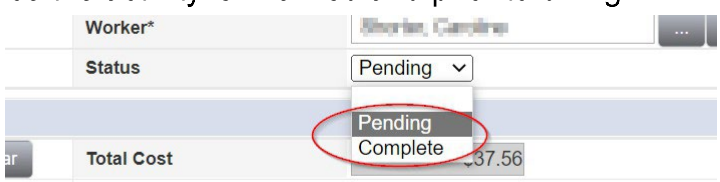
e. If incorrect selections were made, use the caret pointing to the left to move those selections back into the original menu on the left.
   i. Single caret moves the selected options.
   ii. Double carets move all the items.



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

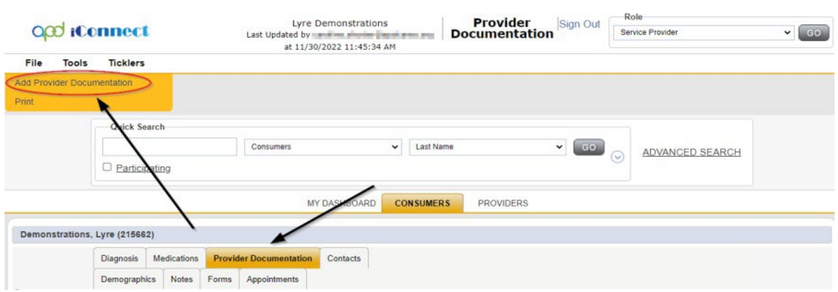
Service Providers will document activities for the following services on the Provider Documentation tab in iConnect:

- 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.

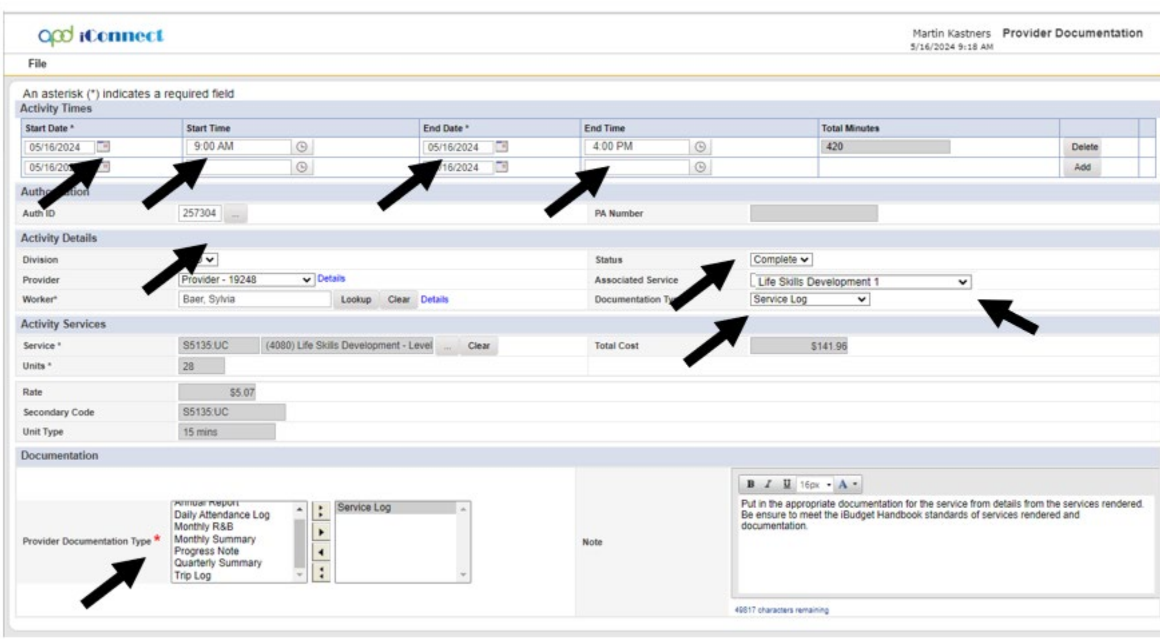
7. Add the Documentation Type from the drop-down menu.

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.

12. Status = Complete.

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