

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).

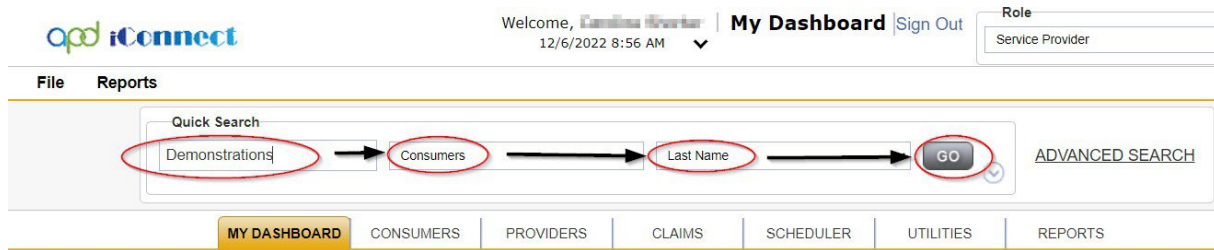
Please refer to the [Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook](#) for specific documentation requirements. Services provided after the implementation of iConnect must be added to iConnect prior to billing. Once a service is live in iConnect, the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

Intro to completing Provider Documentation Screens with detailed images

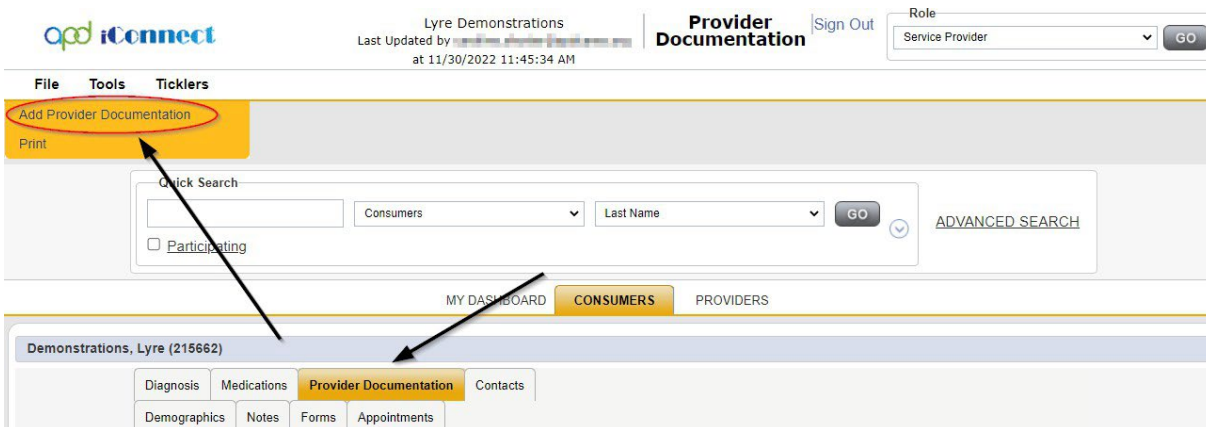
1. To begin, log into iConnect and set Role = **Service Provider** or **Service Provider Worker**. Click **Go**.

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"

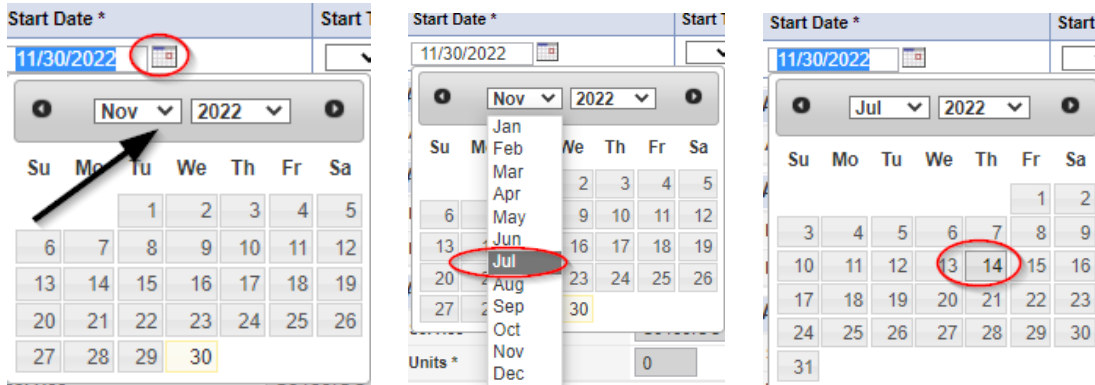


3. Click the **Provider Documentation** tab > click **File > Add Provider Documentation**.

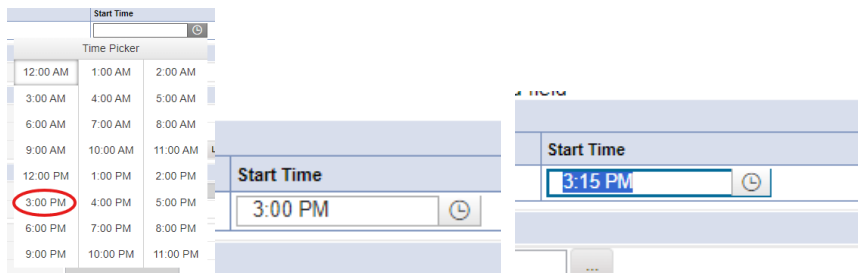



4. The Provider Documentation Details page is displayed. Update the following fields:

- 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**. 

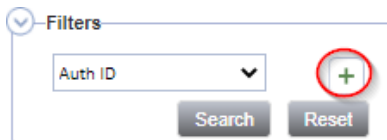
Start Date *	Start Time	End Date *	End Time	Total Minutes	
07/14/2022	3:00 PM	07/14/2022	3:15 PM		

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

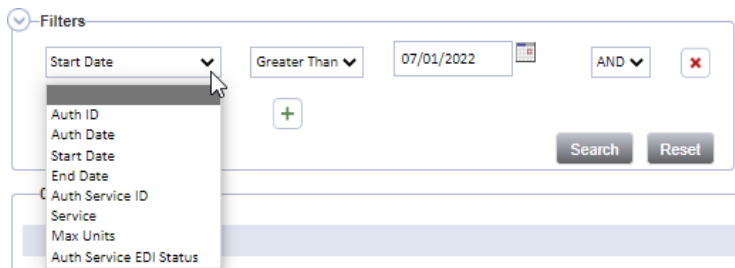
5. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations. There are specific circumstances in which you may skip this step, but that will be listed in the documentation specific instructions.



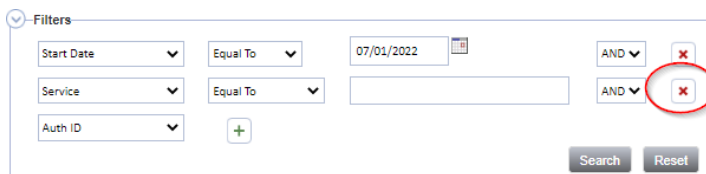
- a. Using the Filter Options can assist with locating the necessary Auth ID.
- b. Use the Green + to add filters.



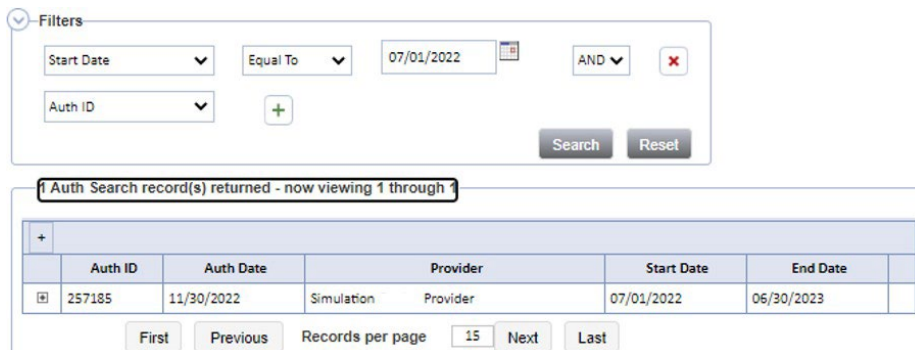
- c. Make the appropriate selections from the dropdown menus.



- d. Use the Red X to remove filters.



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



Filters

Start Date Equal To 07/01/2022 AND

Auth ID

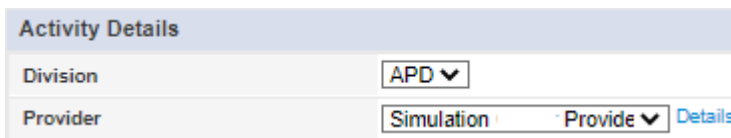
Search Reset

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

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

First Previous Records per page 15 Next Last

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

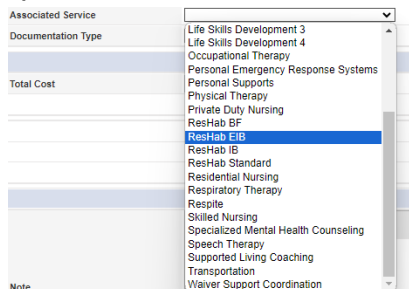


Activity Details

Division APD

Provider Simulation Provide Details

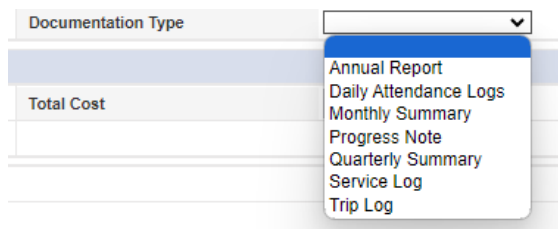
8. Associated Service can be chosen when inputting Annual Report, Quarterly Report, and any other provider documentation for quick reference in the Provider Documentation tab of the Consumer's record. Select the appropriate service associated with the provider documentation from the drop-down menu.



Associated Service

- Life Skills Development 3
- Life Skills Development 4
- Occupational Therapy
- Personal Emergency Response Systems
- Personal Supports
- Physical Therapy
- Private Duty Nursing
- ResHab BF
- ResHab EIS**
- ResHab IG
- ResHab Standard
- Residential Nursing
- Respiratory Therapy
- Respite
- Skilled Nursing
- Specialized Mental Health Counseling
- Speech Therapy
- Supported Living Coaching
- Transportation
- Waiver Support Coordination

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.



Documentation Type

- Annual Report
- Daily Attendance Logs
- Monthly Summary
- Progress Note
- Quarterly Summary
- Service Log
- Trip Log

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	██████	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 *	<input type="text"/>	<input type="button" value="..."/>	<input type="button" value="Clear"/>	Total
Units *	<input type="text"/>			

a. Select the Service.

DialogVendorServiceSelectPopUp

Search By: Service Type Search Text:

ServiceID	ServiceCode	SecondaryCode	Service	UnitCost	UnitType	EffectiveDate	EndDate	SvcStartDate	SvcEndDate	VServiceID	AuthServiceID	MaxAuth	Used	Remaining
5825	S5135:UC	S5135:UC	(4080) Life Skills Development - Level 1 (Community Inclusion)	3.13	15 mins	11/29/2021		07/01/2022	06/30/2023	251237	156906	400	0.00	400.00

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

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 *	S5135:UC (Life Skills Development - Lunch) Clear Total Cost \$37.56
Units *	12
Rate	\$3.13
Secondary Code	S5135:UC

Activity Services	
Service *	S500:PWV (Provide Additional Documentation) Clear Total Cost \$0.00
Units *	1
Rate	\$0.00
Secondary Code	S500:PWV
Unit Type	Units

12. Provider Documentation Type = Select as needed.

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

Documentation	
Provider Documentation Type *	<ul style="list-style-type: none"> 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 *	<ul style="list-style-type: none"> Annual Report Daily Attendance Log Monthly R&B Monthly Summary Progress Note Quarterly Summary Trip Log

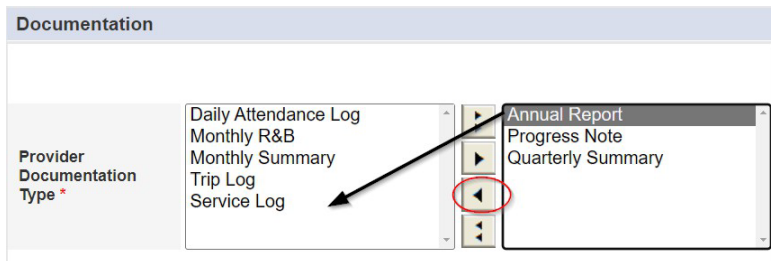
- c. Ctrl + Mouse Clicks can be used to make multiple selections at one time (example below).

Documentation	
Provider Documentation Type *	<ul style="list-style-type: none"> Annual Report Daily Attendance Log Monthly R&B Monthly Summary Progress Note Quarterly Summary Trip Log

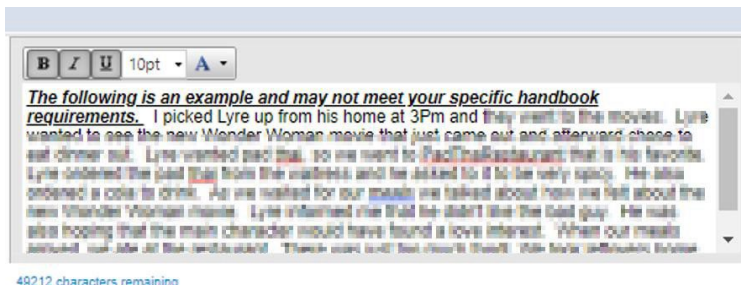
- d. Selections should be moved to the box on the right.

Documentation	
Provider Documentation Type *	<ul style="list-style-type: none"> Daily Attendance Log Monthly R&B Monthly Summary Trip Log Service Log

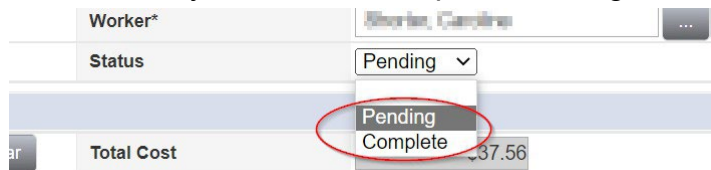
- e. If incorrect selections were made, use the caret pointing to the left to move those selections back into the original menu on the left.
 - i. Single caret moves the selected options.
 - ii. Double carets move all the items.



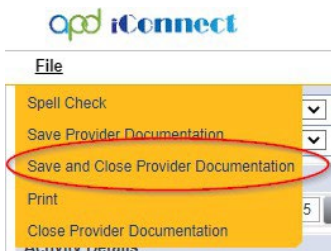
13. Note - Enter details of the services provided to the consumer by typing in the text box.



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.

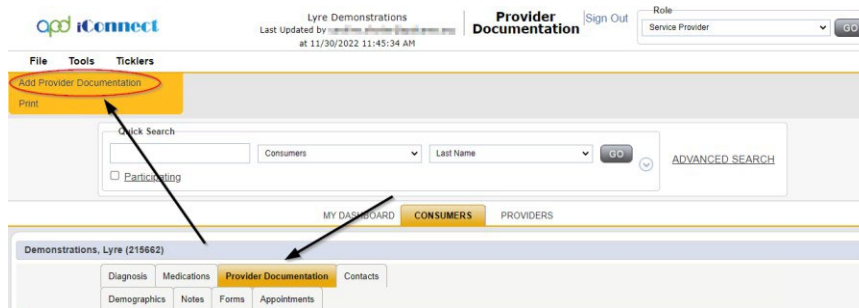


Trip Logs

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

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

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



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

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

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

4. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations.
5. Click the Authorization.
 - a. The Authorization ID will populate on the Provider Documentation details page.

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

12. Status = Complete

An asterisk (*) indicates a required field

Activity Times

Start Date *	Start Time	End Date *	End Time	Total Minutes	Rounded Minutes	
04/14/2023	2:00 AM	04/14/2023	3:00 AM	60	60	Delete
04/14/2023		04/14/2023				Add

Authorization

Auth ID: 638363 PA Number: []

Activity Details

Division: APD Status: Pending

Provider: [] Associated Service: Transportation

Worker*: Provider, Sylvia Documentation Type: Trip Log

Activity Services

Service*: T2002:UC (4310) Transportation - Month Total Cost: \$21.88

Units*: 1

Rate: \$100.00

Secondary Code: T2002:UC

Unit Type: Month

Documentation

Provider Documentation Type*: [Trip Log]

Note

- Starting location Lyle's home (1234 E. Tampa St. Tampa FL 33602)
- Starting Odometer Reading (1,200)
- Destination (Big Top LDS3 1234 E. Miami St. Tampa FL 33602)
- Ending Odometer Reading (1,208)
- Total Mileage (8 miles)

50000 characters remaining

13. Click File > Save and Close Provider Documentation.