Chapter 18a | WSC Service Recording

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. Often these services must be documented as frequently as daily, but some can be documented monthly.

1. Life Skills Development – Level 1 (Companion)
2. Life Skills Development – Level 2 (Supported Employment
3. Life Skills Development – Level 3 (Adult Day Training - ADT)
4. Residential Habilitation (Standard)
5. Residential Habilitation (Behavior Focused)
6. Residential Habilitation (Intensive Behavior)
7. Supported Living Coaching
8. Support Coordination
9. Behavior Analysis Services
10. Behavior Assistant Service

WSC Monthly Service Recording

Waiver Support Coordinators (WSCs) should maintain all progress notes in one place in iConnect. To streamline the entry of progress notes, iConnect has been updated so that the session notes are included within one screen design under the Provider Documentation Tab.

WSC Advisory #2023-006 released on August 4, 2023 provides a method to streamline Progress Notes within iConnect. Waiver Support Coordinators (WSCs) and Consumer-Directed Care Plus (CDC+) Consultants are required to maintain Progress Notes (also referred to as Case Notes) in iConnect in accordance with the iBudget Handbook.

WSCs and CDC+ Consultants may maintain all billable contacts in a single Progress Note for each month using the authorized service code for Support Coordination. To do so, the WSC or CDC+ Consultant will enter all billable contacts for the same calendar month in the Progress Notes field.

They will also need to note the dates that the contacts occurred within that same month.

1. Monthly, the Waiver Support Coordinator can choose to record their Support Coordination on a monthly (billable) note, and an additional contact note, both as Activities on the Provider Documentation tab in iConnect.

Or the Waiver Support Coordinator can record their Support Coordination on a monthly (billable) note that contains all dates when contacts were made.

2. The contacts can be with the recipient or with persons important in the recipient's life, including family members, legal representatives, service providers, or community members.

3. The contacts can be via telephone, letter writing, or e-mail transmission. Any contact or activity on behalf of the recipient must be documented in the support coordination progress notes and on the Provider Documentation tab in iConnect.

4. The contacts must be individualized and related to services and benefits specific to the recipient who is receiving services.

5. It is best practice to complete the Additional Contact Note as the last note of the month.

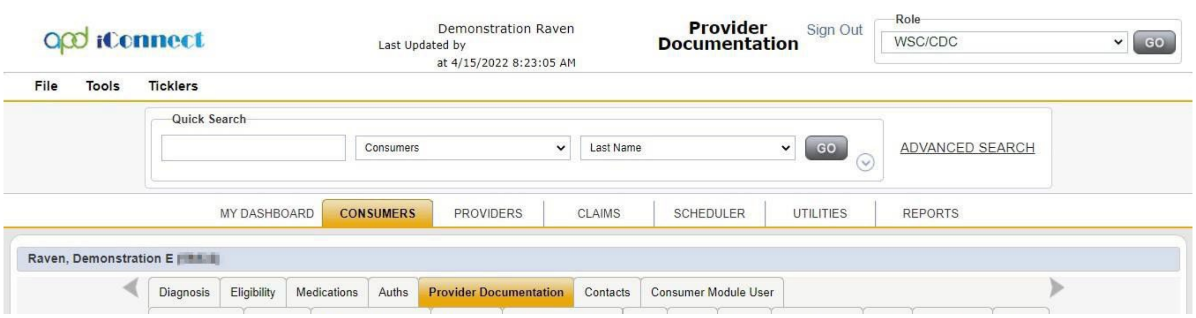
6. Administrative activities such as typing letters, filing, mailing, or leaving messages do not qualify as billable contacts or activities. These activities should be documented as Administrative/Non-Billable Activities.

7. In addition, activities including telephone calls to schedule meetings, setting up face-to-face visits or scheduling meetings with the recipient's employer, family, or providers do not qualify as contacts.

Support Coordination Billable Note

1. To begin, log into iConnect and set Role = WSC/CDC. 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: Defaults to today and is editable
    b. Start Time: Leave Blank

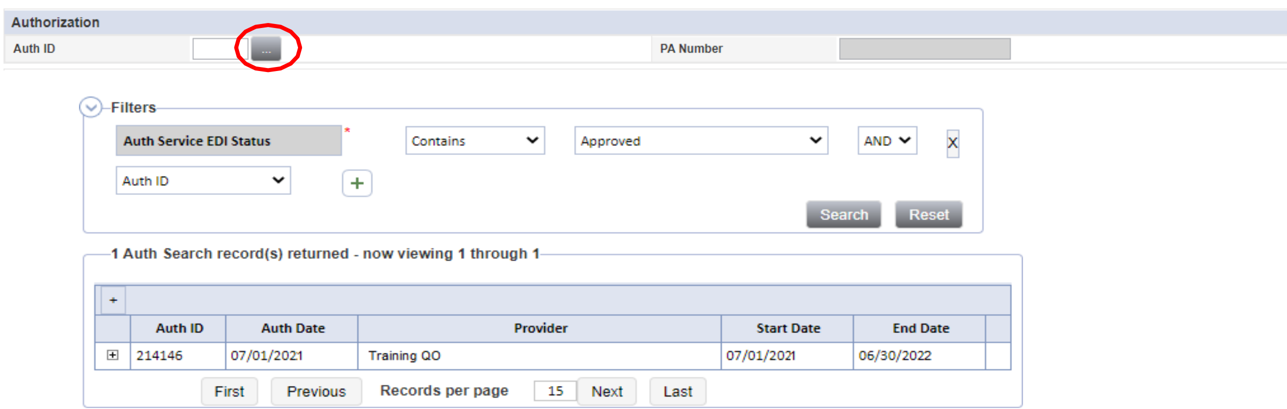
c. End Date: Defaults to today and is editable

d. End Time: Leave Blank

e. Click Add

f. Select the appropriate Authorization by clicking the ellipsis and searching for the current Auth ID

i. Click the Support Coordination Authorization. The Authorization ID is populated on the Provider Documentation details page.



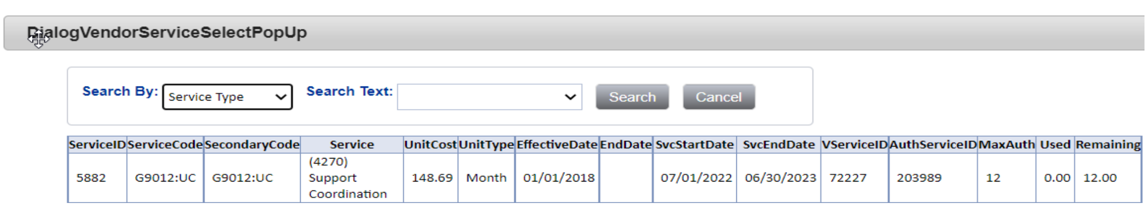
Auth ID	Auth Date	Provider	Start Date	End Date
214146	07/01/2021	Training QO	07/01/2021	06/30/2022

g. Once the Auth ID is Selected, the Division the Provider, and Worker fields will populate.

h. Worker name defaults to the user signed into iConnect at the time of entry. If the Worker needs to be updated please proceed to As Needed: Updating the Worker Name.

i. Click the Service ellipsis to display a list of services.

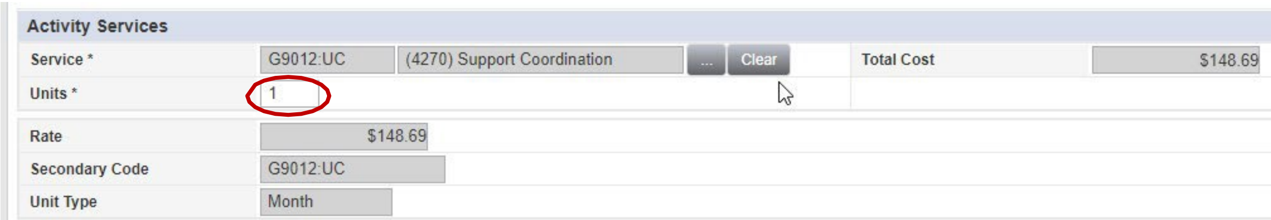
j. Select the Authorized Service



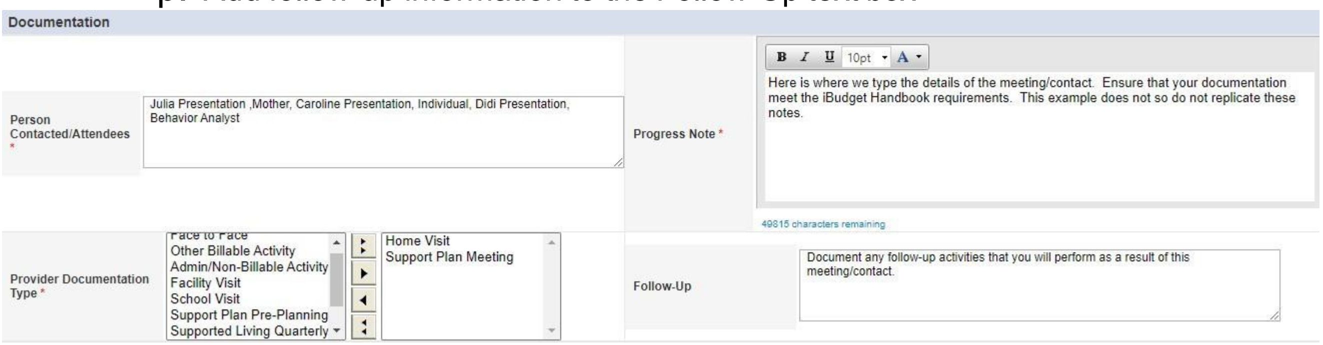
ServiceID	ServiceCode	SecondaryCode	Service	UnitCost	UnitType	EffectiveDate	EndDate	SvcStartDate	SvcEndDate	VServiceID	AuthServiceID	MaxAuth	Used	Remaining
5882	G9012:UC	G9012:UC	(4270) Support Coordination	148.69	Month	01/01/2018		07/01/2022	06/30/2023	72227	203989	12	0.00	12.00

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

l. Update the number of Units = 1.

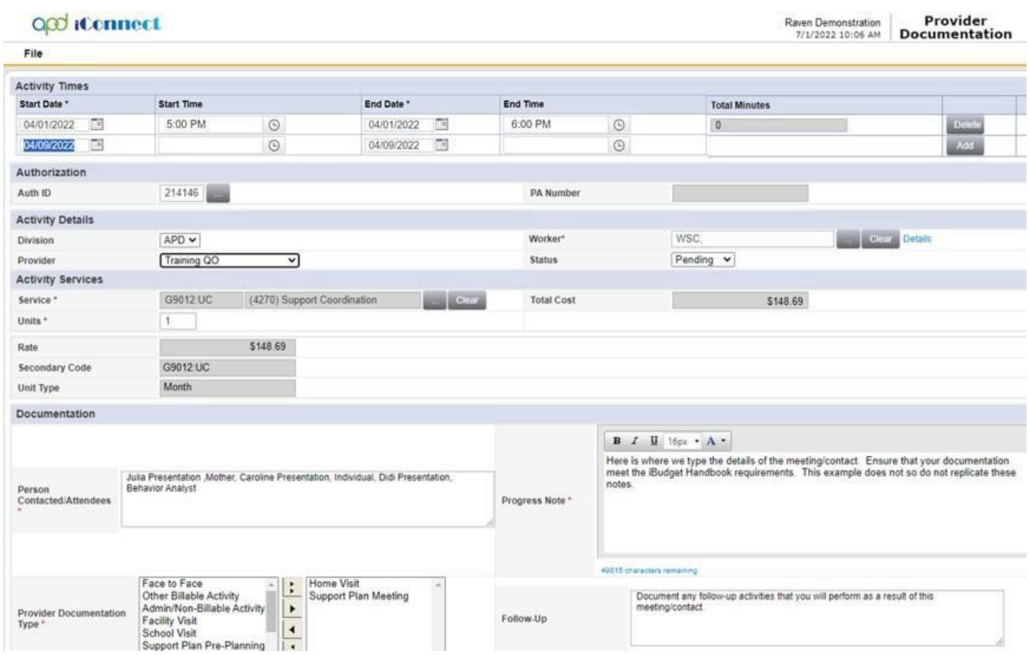


m. Add text to the Person Contacted/Attendees box
n. Add text to the Progress Note text box
o. Provider Documentation Type = select applicable items
p. Add follow-up information to the Follow-Up text box



4. Click File > Save and Close Provider Documentation.

There is no longer a need to Save and Add Session Note as the WSC's activities are now documented in the additional fields included at the bottom of this page.

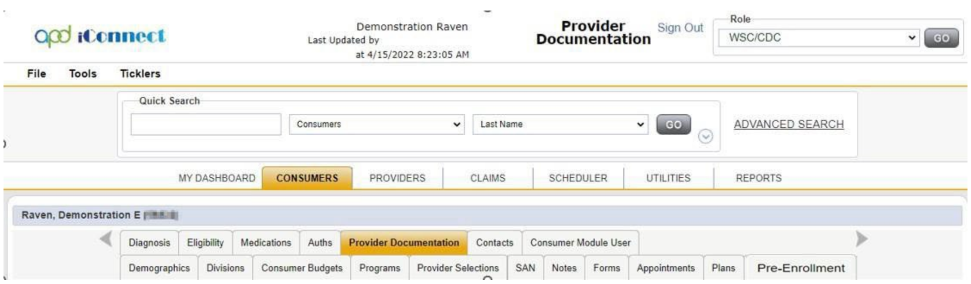


WSC Progress Notes – Additional Contact Note

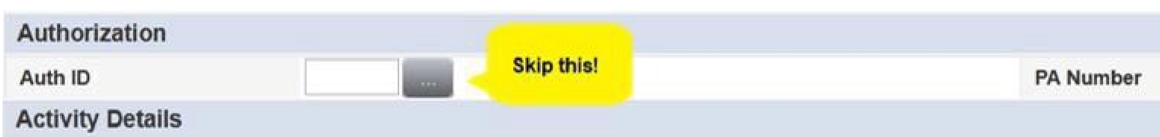
1. Anytime during the month, when the Waiver Support Coordinator has contact with a consumer or does work on their behalf, they will record his / her Support Coordination progress notes on the Provider Documentation tab in iConnect. This is where the second contact of the month required by the iBudget Handbook will be recorded as well.

2. To begin, log into iConnect and set Role = WSC/CDC. Click **Go.**

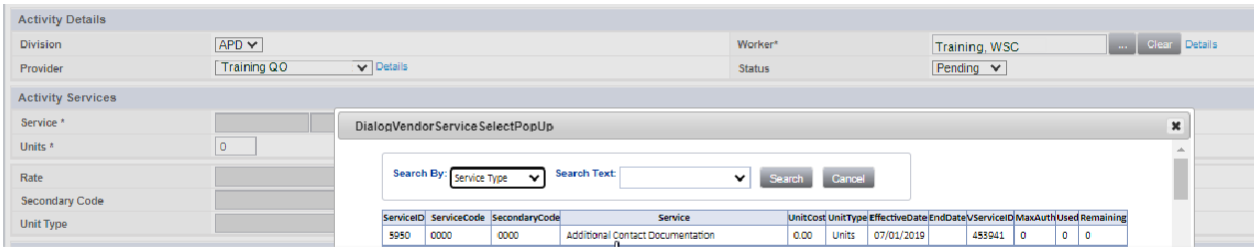
3. Navigate to the Consumers record and click the **Provider Documentation** tab > click **File** > **Add Provider Documentation.**



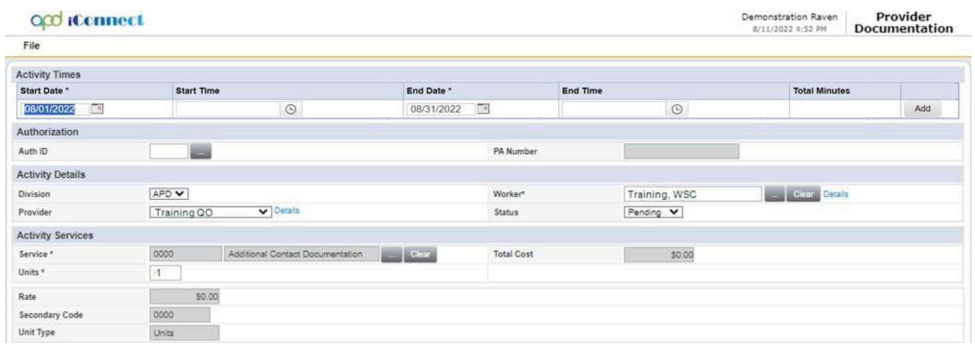
4. The Provider Documentation Details page is displayed. Update the following fields:
   a. Start Date: Defaults to today and is editable
   b. Start Time: Leave blank
   c. End Date: Defaults to today and is editable
   d. End Time: Leave blank
   e. Leave the Auth ID field blank.



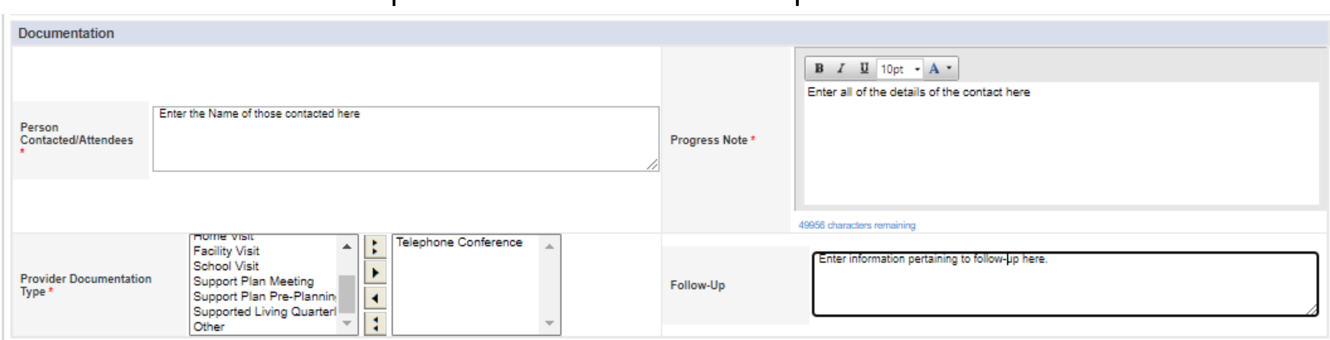
   f. Provider = for roles with Program level access, like the WSC/CDC the worker must have an open Provider Selection record for the provider name to display in the dropdown
      - Worker name defaults to the user signed into iConnect at the time of entry. If the Worker needs to be updated please proceed to As Needed: Updating the Worker Name.
   g. Click the Service ellipsis to display a list of services. Select the Service Code 0000 = Non-Billable Progress Note Documentation.



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



i. Update the number of Units = 1.
j. Add text to the Person Contacted/Attendees box
k. Add text to the Progress Note text box
l. Provider Documentation Type = select applicable items
m. Add follow-up information to the Follow-Up text box



5. Click File > Save and Close Provider Documentation.

There is no longer a need to Save and Add Session Note as the WSC's activities are now documented in the additional fields included at the bottom of this page

WSC Progress Notes – Administrative/Non-Billable Activities

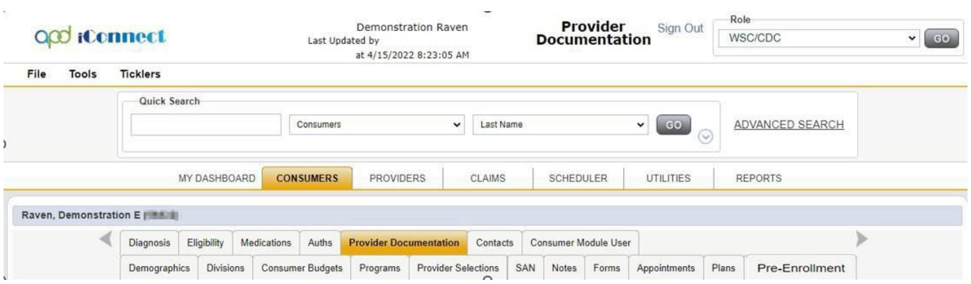
Waiver Support Coordinators (WSCs) should maintain all progress notes in one place in iConnect, including case notes related to administrative/non-billable activities. For this purpose, WSCs should use the service code, “0000-NB WSC Administrative Activity.”

Examples include, but are not limited to:

- Documenting the sending of a copy of the support plan to the client and their legal representative.
- Documenting a back-and-forth communication with a client/legal representative that is not tied to a billable contact.
- Documenting activities related to scheduling meetings with the client, legal rep, client’s employer, family, or service providers.

1. To begin, log into iConnect and set Role = WSC/CDC. Click **Go**

2. Navigate to the Consumers record and click the **Provider Documentation** tab > click **File > Add Provider Documentation**



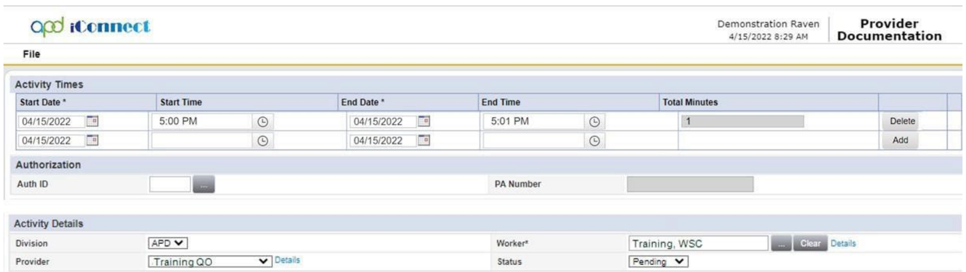
3. The Provider Documentation Details page is displayed. Update the following fields:
   a. Start Date: Defaults to today and is editable
   b. Start Time: Select from the dropdowns
   c. End Date: Defaults to today and is editable
   d. End Time: Select from the dropdowns
   e. Click Add

   f. DO NOT CHOOSE AN AUTHORIZATION!!!!

g. Division = APD

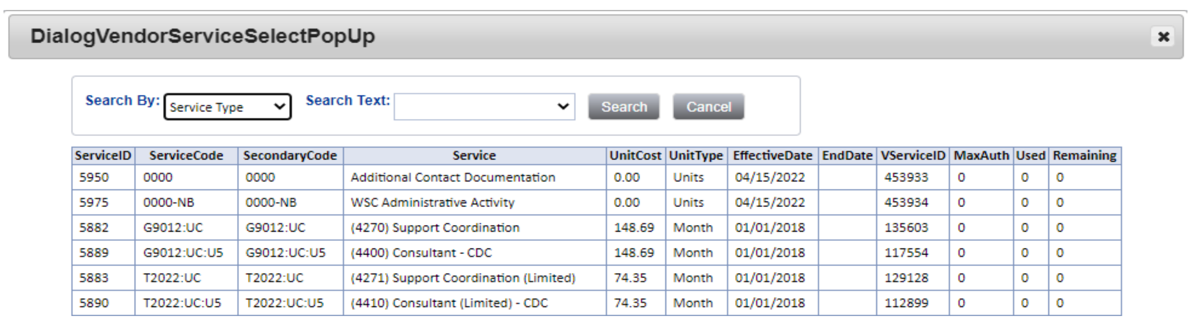
h. Provider = Choose your provider record

i. Worker name defaults to the user signed into iConnect at the time of entry. If the Worker needs to be updated please proceed to [As Needed: Updating the Worker Name.](#)



j. Click the Service ellipsis to display a list of services.

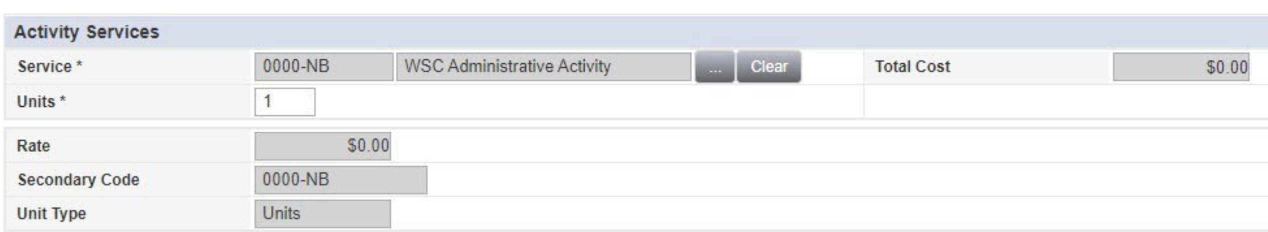
k. Select "0000-NB" Select the Service Code 0000-NB = WSC Administrative Activity.



ServiceID	ServiceCode	SecondaryCode	Service	UnitCost	UnitType	EffectiveDate	EndDate	VServiceID	MaxAuth	Used	Remaining
5950	0000	0000	Additional Contact Documentation	0.00	Units	04/15/2022		453933	0	0	0
5975	0000-NB	0000-NB	WSC Administrative Activity	0.00	Units	04/15/2022		453934	0	0	0
5882	G9012:UC	G9012:UC	(4270) Support Coordination	148.69	Month	01/01/2018		135603	0	0	0
5889	G9012:UC:U5	G9012:UC:U5	(4400) Consultant - CDC	148.69	Month	01/01/2018		117554	0	0	0
5883	T2022:UC	T2022:UC	(4271) Support Coordination (Limited)	74.35	Month	01/01/2018		129128	0	0	0
5890	T2022:UC:U5	T2022:UC:U5	(4410) Consultant (Limited) - CDC	74.35	Month	01/01/2018		112899	0	0	0

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

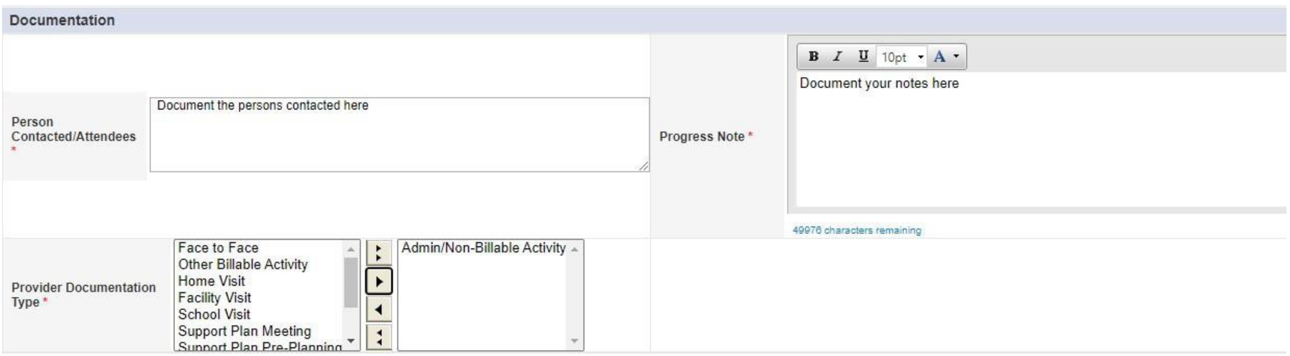
m. Update the number of Units = 1.



n. Add Text to the Person Contacted/Attendees box

o. Add Text to the Progress Note

p. Provider Documentation Type = Admin/Non-Billable Activity.
q. Add Service Log documentation to the Note Text box.



4. Click File > Save and Close Provider Documentation.

There is no need to Save and Add Session Note as the WSC's activities are documented in the Progress note text field.