

Chapter 18b | 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.

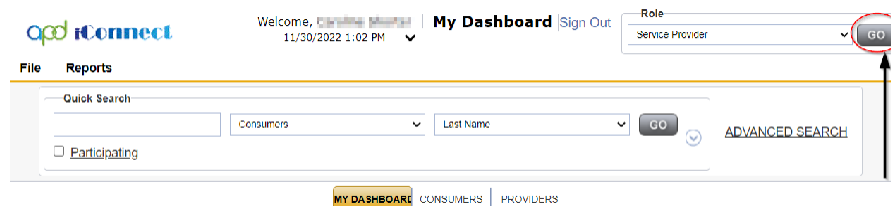
This job aid will encompass using iConnect to record services using the Provider Documentation Tab of the Consumer’s record. If services are required to use the EVV system, this aid will not address those tasks, please refer to the [EVV Information and Training Material](#) website.

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).

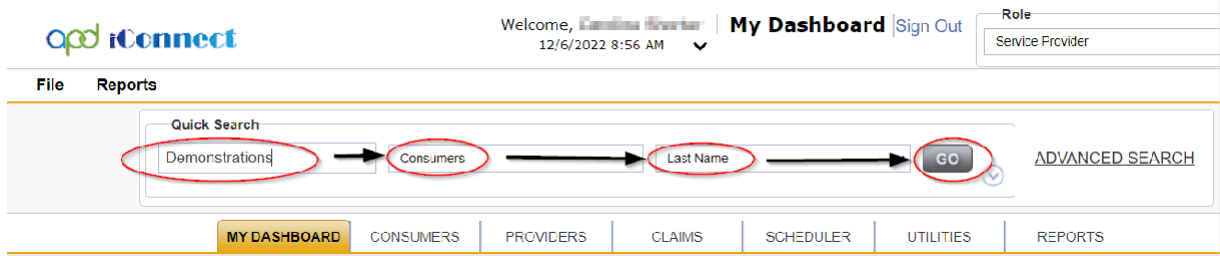
Please refer to the [Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook](#) for specific documentation requirements. Services provided after the implementation of iConnect must be added to iConnect prior to billing. Once a service is live in iConnect, the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

Intro to completing Provider Documentation Screens with detailed images

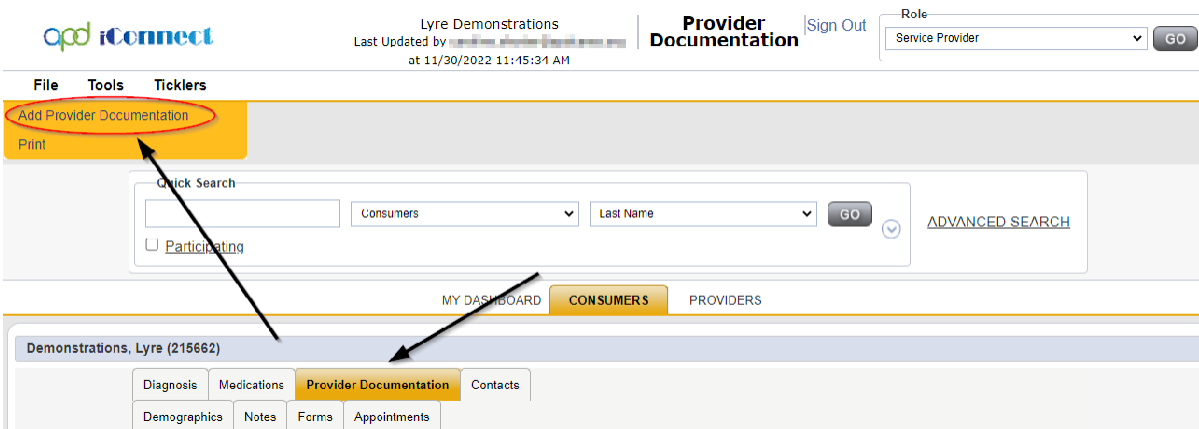
1. To begin, log into iConnect and set Role = **Service Provider** or **Service Provider Worker**. Click **Go**.



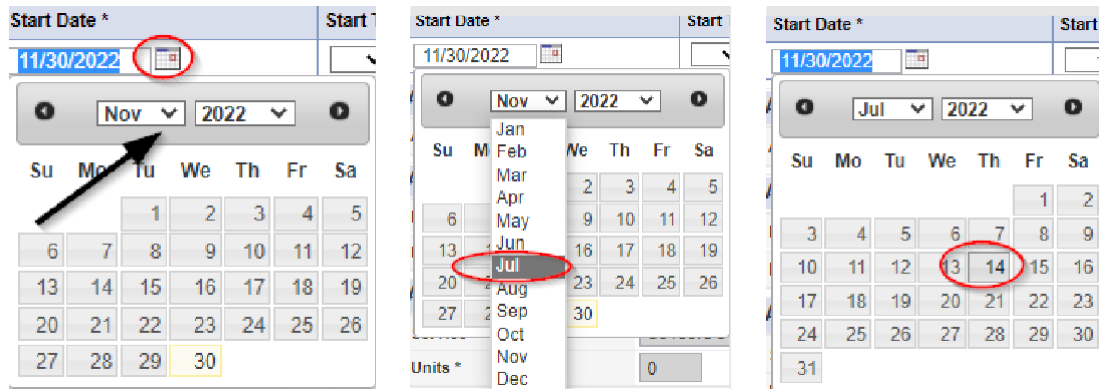
2. Navigate to the Consumer’s record.
 - a. Type the consumer’s last name in the Quick Search text field (first field on the left)
 - b. Ensure that the second field contains Consumers, third field contains last name and click “Go”



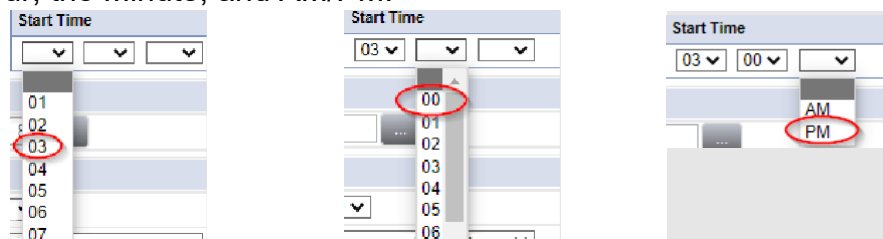
3. Click the **Provider Documentation** tab > click **File > Add Provider Documentation**.



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.



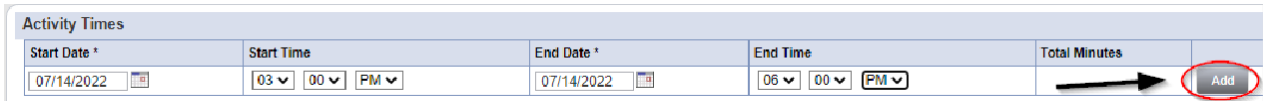
b. Start Time: Use the Dropdown Menus to make the selections. Select the Hour, the Minute, and AM/PM.



- 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 dropdown menus.

e. Click **Add**. 

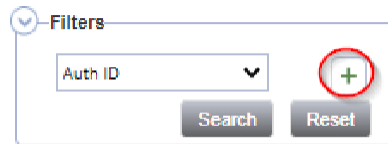
i. Notice a new line that appears for dates and times, do not add a second date unless instructed otherwise.



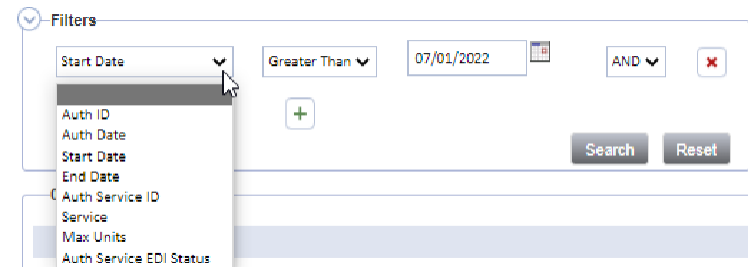
- 5. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations. There are specific circumstances in which you may skip this step, but that will be listed in the documentation specific instructions.



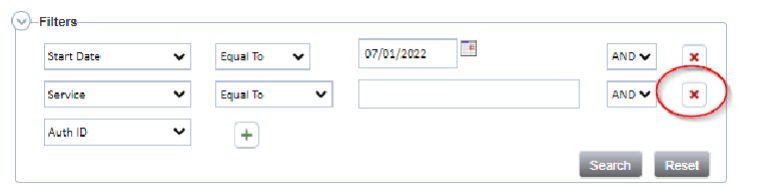
- a. Using the Filter Options can assist with locating the necessary Auth ID.
- b. Use the Green + to add filters.



- 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. 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](#).
9. 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.
10. 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		Total Cost
Service *	S5135:UC (S5135) Life Skills Development - Level ... Clear	\$37.56
Units *	12	
Rate	\$3.13	
Secondary Code	S5135:UC	

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

11. 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 carat pointing to the right will move selections to the box on the right.

i. Single carat moves the selected options.

ii. Double carats 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

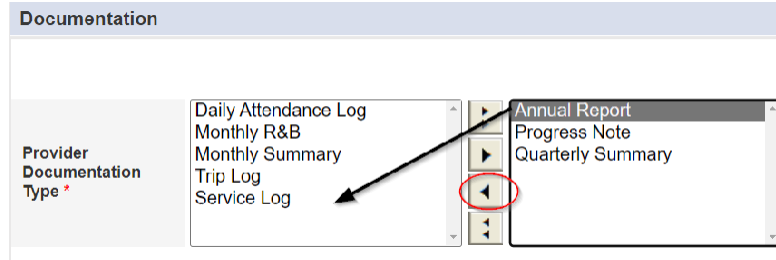
c. Ctrl + Mouse Clicks can be used to make multiple selections at one time (example below).

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

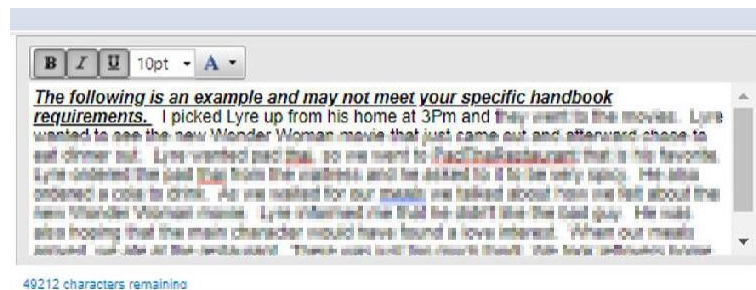
d. Selections should be moved to the box on the right.

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

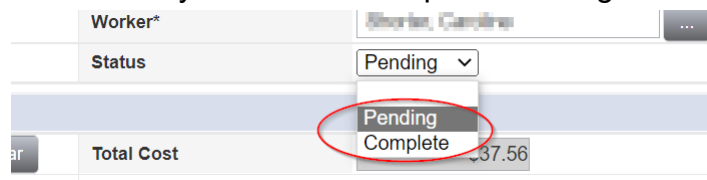
- e. If incorrect selections were made, use the carat pointing to the left to move those selections back into the original menu on the left.
 - i. Single carat moves the selected options.
 - ii. Double carats move all the items.



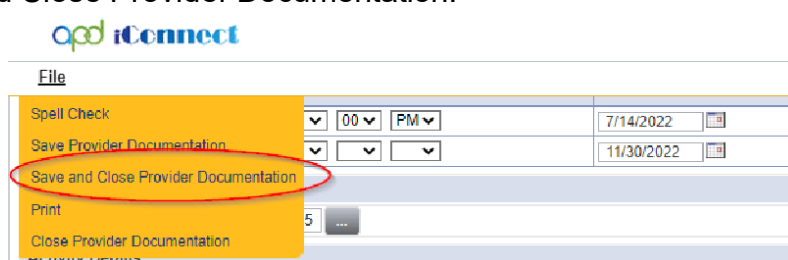
12. Note - Enter details of the services provided to the consumer by typing in the text box.



13. Status - Can be updated by using the dropdown menu. This should be changed to Complete once the activity is finalized and prior to billing.



14. 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

An attendance log is for Life Skills Development 3/4 or Residential Habilitation. It records the time period (not for Residential Habilitation) and dates during the month when services were provided.

If the service is Residential Habilitation, the provider will need to do monthly logs. The provider creates one log, with a separate date entry for each day in the month services were provided.

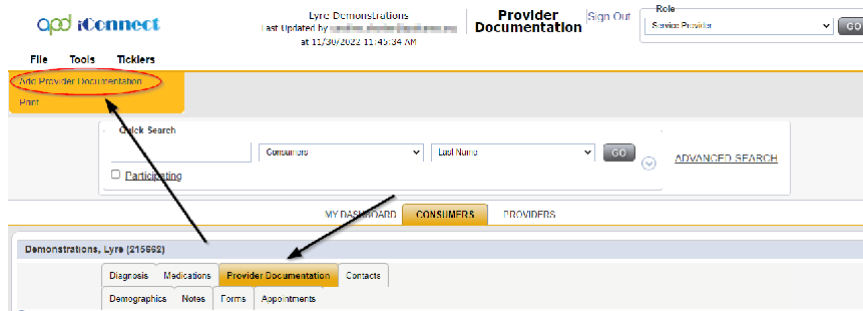
If the service is LSD3, the provider will need to do weekly logs. The provider creates one log, with a separate date entry for each day in the week services were provided.

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 be authorized as the monthly rate.***
 - *If the Service provided is less than 24 days, the service must be authorized as 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 or skip (see conditions below)
 - c. End Date: Select the Date of Service
 - d. End Time: Select the end time of the service or skip (see conditions below)
 - e. Click **Add** or skip (see conditions below)

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 if there are no absences during the time period.
 - For example:
 - 01/01/2024 12:00AM - 01/31/2024, 11:59PM
 - For services approved as monthly services: annotate any absences in the Note text field to document accurate attendance.

Skipping Times and Add button:

Residential Habilitation services that are **approved at monthly rates**, the start date can be the beginning of the month and the end date can be the last day of the month, times can be skipped and the Add button can be skipped to omit the time entry.

- For example:
 - 01/01/2024 Skip Time - 01/31/2024, Skip Time
 - Skip ADD button.

- **Do Not Skip** the times and Add button if dates and times have already been added.
 - Annotate any absences in the Note text field to document accurate attendance.
 - If an individual is not at the home during specific dates (has absences) within the month, then there can be multiple intervals. This must be done for services **authorized as daily rates** to ensure that the quantity of units tabulated are accurate.
 - 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. 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](#).
 7. 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.
 8. 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.
 9. Provider Documentation Type = Select Daily Attendance Log.
 - a. If additional selections are needed, make those additional selections too.

10. 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.
- 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.
 - Document Monthly Service Absences: Lyre went to the beach with parents from 01/15/2024 to 01/20/2024
10. Status = Complete.

The screenshot shows the 'iConnect' interface for 'Provider Documentation'. It includes a table for service logs with columns for Start Date, Start Time, End Date, End Time, and Total Minutes. Below the table are sections for Authorization (Auth ID, PA Number), Activity Details (Units on, Provider, Worker, Status), Activity Services (Service, Units, Rate, Secondary Code, Unit Type), and Documentation (Note). A 'File' menu is visible at the top left of the form area.

12. Click File > Save and Close Provider Documentation.

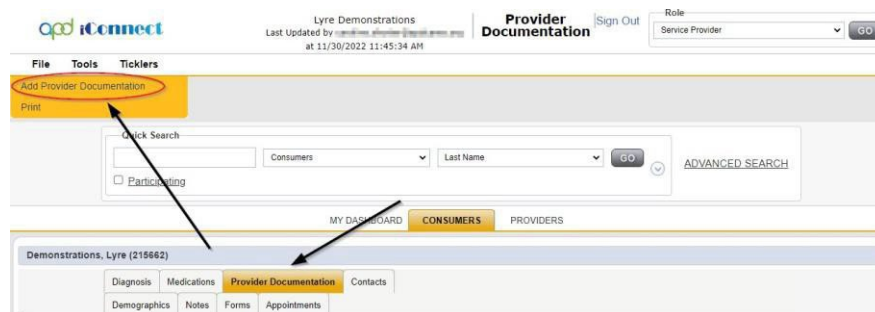
Service Log

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.
 - b. The Authorization ID will populate on the Provider Documentation details page.
6. 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.](#)
7. 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.
 - b. The Activity Services details are populated on the Provider Documentation details page.
8. Verify the number of Units is populated. Note the Total Cost value changes as the number of Units change.

9. Provider Documentation Type = Select Service Log.
 - a. If additional selections are needed, make those additional selections too.
10. Note = Enter details of the services provided to the consumer.
11. Status = Complete.

The screenshot shows the 'Provider Documentation' form in iConnect. The form is divided into several sections: File, Authorization, Activity Details, Activity Services, and Documentation. Arrows point to the following fields: Start Date (07/14/2022), Start Time (03:00 PM), End Date (07/14/2022), End Time (06:00 PM), Auth ID (257185), Division (APD), Provider (Simulation), Status (Complete), Service (S5135:UC), Units (12), Rate (\$3.13), and Documentation Type (Service Log). The Note field contains a sample text about picking up a client named Lyre.

12. Click 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:

- a. Special Medical Home Care
- b. Supported Living Coaching
- c. Dietitian Services
- d. Occupational Therapy
- e. Physical Therapy
- f. Residential Nursing
- g. Respiratory Therapy
- h. Skilled Nursing
- i. Speech Therapy
- j. 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. 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.](#)
7. 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.
8. Verify the number of Units is populated. Note the Total Cost value changes as

9. 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)

10. Note - Enter details of the services provided to the consumer.

11. Status = Complete

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 point to the following fields: 'Start Date' (07/21/2022), 'Start Time' (01:00 PM), 'End Date' (07/21/2022), 'End Time' (02:00 PM), 'Status' (Complete), 'Service' (92507:UC (4260) Speech Therapy), 'Units' (empty), 'Rate' (\$16.02), and 'Provider Documentation Type' (Progress Note). The 'Documentation' section contains a text area with a rich text editor toolbar and a sample note about speech therapy.

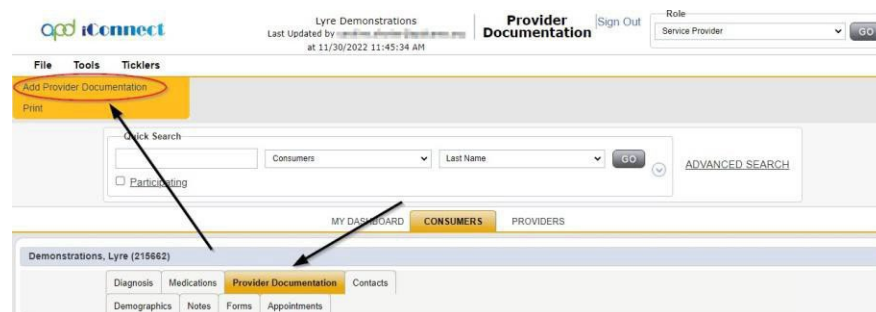
12. Click **File > Save and Close Provider Documentation.**

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. 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.](#)
7. 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.
 - c. The Activity Services details are populated on the Provider Documentation details page.
8. Verify the number of Units is populated. Note the Total Cost value changes as the number of Units change.
9. Provider Documentation Type = Trip Log
10. 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)
11. Status = Complete

File

Lyre Demonstrations 12/1/2022 11:12 AM **Provider Documentation**

Activity Times

Start Date *	Start Time	End Date *	End Time	Total Minutes
7/11/2022	07:00 AM	7/11/2022	07:30 AM	30
12/01/2022		12/01/2022		

Authorization

Auth ID: 257185 PA Number: []

Activity Details

Division: APD Worker*: [] Clear Details

Provider: Simulation Provide Details Status: Complete

Activity Services

Service *: T2002-UC (4310) Transportation - Month Total Cost: \$100.00

Units *: 1

Rate: \$100.00

Secondary Code: T2002-UC

Unit Type: Month

Documentation

Provider Documentation Type: Annual Report, Daily Attendance Log, Monthly R&S, Monthly Summary, Progress Note, Quarterly Summary, Service Log, Trip Log

Note *

- Starting location Lyle's home (1234 E. Tampa St. Tampa FL 336
- 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)

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

Monthly Summary

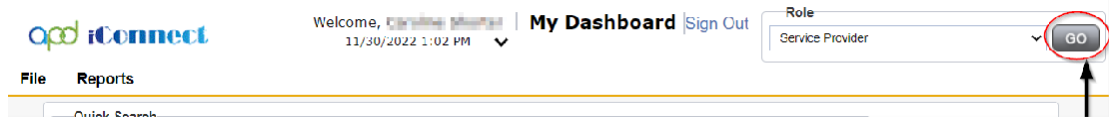
A monthly summary is a written summary of the activities that took place during each month, including the consumer’s progress toward achieving goals. **Add the Monthly Summary as a separate activity using the 0000-WVR Code.**

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

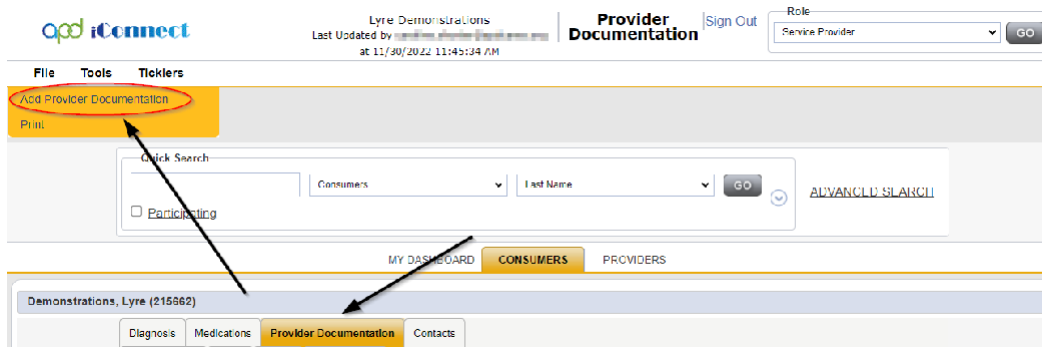
For ResHab Providers: Monthly summaries may be submitted if the provider chooses to do a monthly summary each month rather than a quarterly summary.

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
- c. 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.](#)

The screenshot shows a form with three main sections: 'Authorization', 'Activity Details', and 'Activity Services'. In the 'Authorization' section, there is an 'Auth ID' field with a 'SKIP' button next to it. In the 'Activity Details' section, the 'Division' dropdown is set to 'APD'. In the 'Activity Services' section, the dropdown menu is open, showing 'Simulation' and 'Provider' as options.

6. 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 'DialogVendorServiceSelectPopUp' window. It has a search bar with 'Search By:' set to 'Secondary code' 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.

7. Update the number of units to 1.

The screenshot shows the 'Activity Services' table with the following data:

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

8. Provider Documentation Type = Monthly Summary

9. 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.

10. Status = Complete

The screenshot shows the 'Provider Documentation' form in the iConnect system. 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 and End Date fields.
- Authorization:** Fields for Auth ID and PA Number.
- Activity Details:** Fields for Division (APD), Provider (Simulation), Worker*, and Status (Complete). Arrows point to the Provider and Status fields.
- Activity Services:** Fields for Service* (0000-WVR), Units* (1), Rate (\$0.00), and Secondary Code (0000-WVR). Arrows point to the Service, Rate, and Total Cost fields.
- Documentation:** A list of documentation types including Annual Report, Daily Attendance Log, Monthly R&B, Progress Note, Quarterly Summary, Service Log, and Trial Log. Arrows point to the Monthly Summary and a text area for notes.

11. 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.**

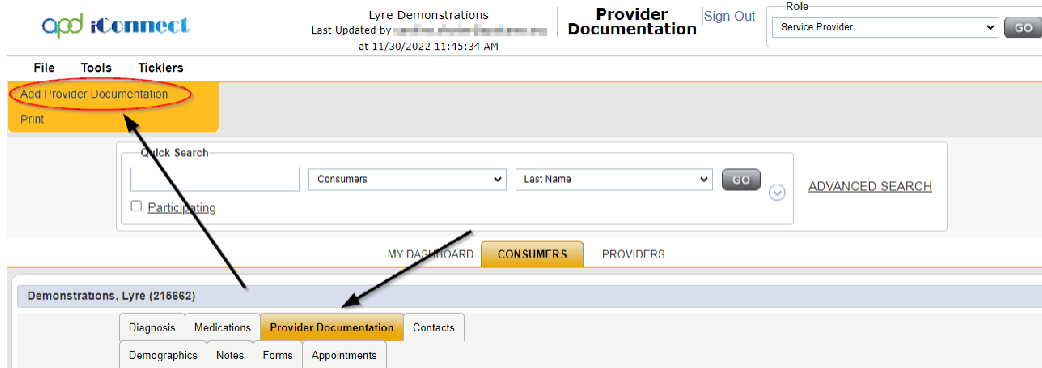
Please refer to [the Intro to completing Provider Documentation Screens with detailed images for instructions](#) on how to complete each field.

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**.

The screenshot shows the top navigation bar of the iConnect system. It includes the iConnect logo, a user profile for 'Cristina M...' with the date '11/30/2022 1:02 PM', and a 'My Dashboard | Sign Out' link. On the right side, there is a 'Role' dropdown menu currently set to 'Service Provider'. A red circle highlights the 'GO' button next to the dropdown, with an arrow pointing to it.

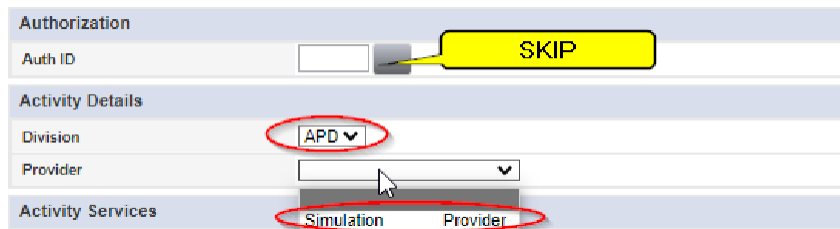
- 2. Navigate to the Consumer's record and click the **Provider Documentation** tab > click **File** > **Add Provider Documentation**.



- 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



- c. 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](#).
- 6. 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
5575	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.

7. Update the number of units to 1.

Activity Services

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

8. Provider Documentation Type = Quarterly Summary

9. 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.

10. Status = Complete

Opd iConnect Lyre Demonstrations 12/1/2022 9:50 AM **Provider Documentation**

File

Activity Times

Start Date *	Start Time	End Date *	End Time	Total Minutes	
08/30/2022	01:00 PM	08/30/2022	01:15 PM	15	Delete
12/31/2022		01/01/2022			Add

Authorization

Auth ID: [] PA Number: []

Activity Details

Division: APD Worker: [] Clear Details

Provider: Simulation Status: Complete

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: Quarterly Summary

Note *

The following is an example and may not meet the Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook Requirements. Make sure that your documentation meets all the necessary requirements and do not copy this example.

Service: Physical Therapy, 1st Quarterly Summary (July 1, 2021 - September 30,2021)

In the last Quarter, Lyre had made excellent proocess towards his PT Goals. He worked

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

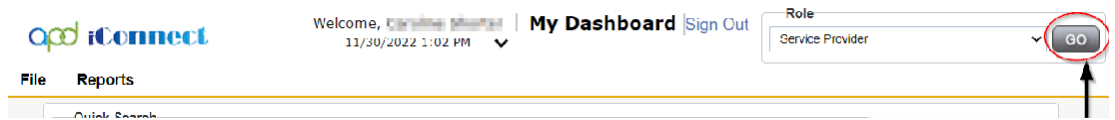
Annual Report

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. **Add the Annual Report as a separate activity using the 0000-WVR Code.**

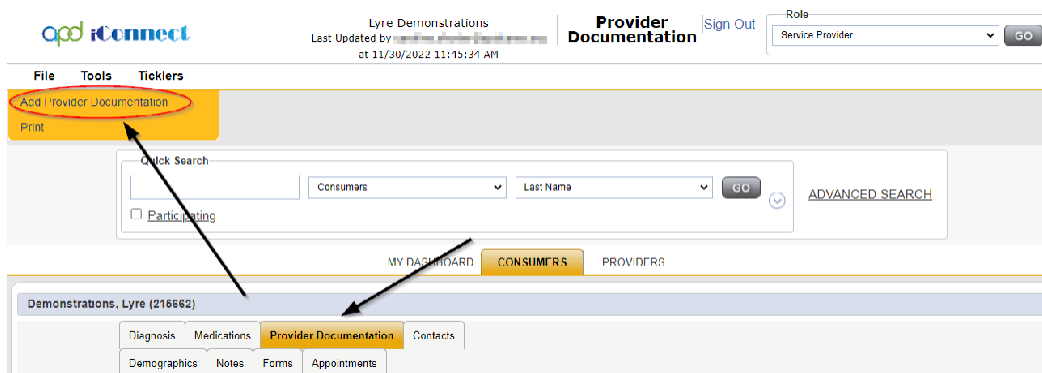
Please refer to [the Intro to completing Provider Documentation Screens with detailed images for instructions](#) on how to complete each field.

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

The screenshot shows a form with the following sections:

- Authorization:** Auth ID field with a yellow 'SKIP' button next to it.
- Activity Details:** Division dropdown menu with 'APD' selected and circled in red. Provider dropdown menu with 'Simulation Provider' selected and circled in red.
- Activity Services:** Section below the dropdowns.

- c. 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.](#)

- 6. 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 contains a search bar with 'Secondary Code' selected and a 'Search' button. 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.

- 7. Update the number of units to 1.

The screenshot shows the 'Activity Services' table with the following data:

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

- 8. Provider Documentation Type = Annual Report

- 9. 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.

10. Status = Complete

The screenshot shows the 'Provider Documentation' form in iConnect. Arrows point to the following fields: 'Start Date' (08/30/2022), 'End Date' (08/30/2022), 'Status' (Complete), 'Service' (0000-WVR), 'Units' (1), and 'Documentation Type' (Annual Report).

11. Click File > Save and Close Provider Documentation.

As Needed: Updating the Worker Name

The Worker name that is displayed in the Provider Documentation is the name of the user that had entered the documentation into iConnect. If the user is not the worker that rendered the service, the Worker name field should be updated to reflect the worker that rendered the service. Follow the steps below to update the Worker name.

NOTE: The following can only be completed if the worker that rendered the service has signed into iConnect at least once and their name appears in the Workers tab of the Provider record. If their name is not in the Workers tab, the user will be able to note the Worker in the Note section of the Provider Documentation.

1. Clear the worker using the **Clear** button.

The 'Activity Details' section shows the 'Worker*' field with the name 'Davis, Joshua'. The 'Clear' button next to it is circled in blue.

2. Click the **Lookup** button; a Worker Search popup will appear

The 'Activity Details' section shows the 'Worker*' field is empty. The 'Lookup' button next to it is circled in blue.

Worker Search Popup

Search by: Last Name Search Text:

Limit search results to my provider workers

MEMBERID	Worker	Title	User ID Active

3. Using the Search textbox: search by last name. Click **Search**

Worker Search Popup

Search by: Last Name Search Text:

Limit search results to my provider workers

MEMBERID	Worker	Title	User ID Active

4. Select new Worker Name from the result

Worker Search Popup

Search by: Last Name Search Text:

Limit search results to my provider workers

31 record(s) returned

MEMBER ID	Worker	Title	User ID Active
9491	Training, FCC		Yes
9346	TRAINING, Worker_19411		No
10755	training, worker_19418		No
10756	training, Worker_19419		No
9708	Training, Worker_SE1		Yes
9717	training, worker_SE10		Yes
9718	training, worker_SE11		Yes
9719	training, worker_SE12		No
9720	training, worker_SE13		Yes
9721	training, worker_SE14		Yes
9722	training, worker_SE15		Yes
9723	training, worker_SE16		No
9724	training, worker_SE17		No
9725	training, worker_SE18		Yes

5. The Worker's name will appear.

Activity Details

Division: APD

Provider: Simulation EVV Provider 2 [Details](#)

Worker*: [Details](#)