

Provider Service Authorization Data Report

Introduction

The Agency for Persons with Disabilities (APD) has an External Provider Interface (EPI) that allows providers to import select data into iConnect from their own Electronic Health Record (EHR) system in lieu of entering the data directly into iConnect for provider documentation into the client records. In addition to the existing iConnect Provider EPI report, this new Provider Service Authorization Data Report allows Service Providers the ability to pull information from iConnect and populate their Electronic Health Record (EHR) system with iConnect client and service authorization information. This report will reduce the amount of information that the Service Provider would need to manually transfer from iConnect to their EHR. This report can also be used by Service Providers to view a list of their Service Authorizations. To set up your EHR system to be used with the EPI, please review the [EPI iConnect Library](#) and the [iConnect External Provider Interface Training Guide for Providers](#) for next steps.

This job aid will give instructions on how to pull that report with the following data elements: Auth Service ID, Vendor Service ID, Authorization ID, iConnect ID, Consumer First Name, Consumer Last Name, Provider ID Medicaid ID, Service Status, Service Code, Service Description, Start Date, End Date, Provider Name, ProviderID (iConnect ID), Identifier, PA No, Unit Type, Units Per, Units of Measure, Max Units, Rate and Comments.

The following APD Staff Roles will have access to this report:

APD Main
APD Admin
Region QA Workstream Lead
Region QA Workstream Worker
Region Waiver Workstream Lead
ROM/Deputy ROM
Service Provider
State Office Process Owner
State Office Worker
Tier I Help Desk
Tier II Help Desk

Pulling the Provider Service Authorization Data Report

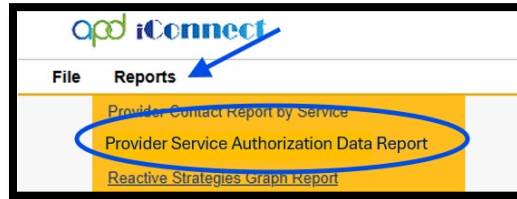
1. To begin, log into iConnect and set Role. Click **Go**.



Role
Service Provider

GO

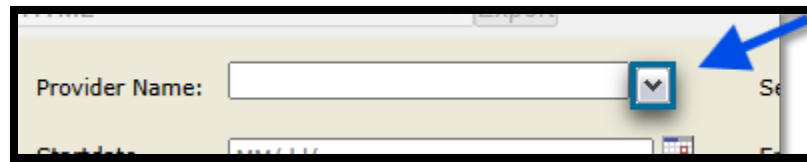
- On **My Dashboard**, navigate to the **Reports** menu dropdown and select **Provider Service Authorization Data Report**.



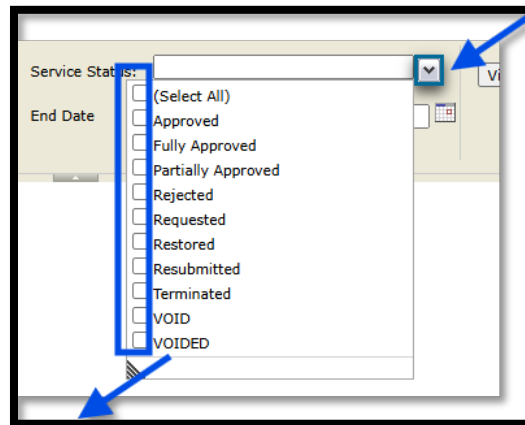
- A new window opens with the available search criteria. Fill out the search criteria.

 A screenshot of a search criteria form. The form has a title bar that says 'HTML' and an 'Export' button. It contains four input fields: 'Provider Name' (a dropdown menu), 'Service Status' (a dropdown menu), 'Start Date' (a date field with a calendar icon), and 'End Date' (a date field with a calendar icon).

- Provider Name: use the dropdown to check the name of the provider.

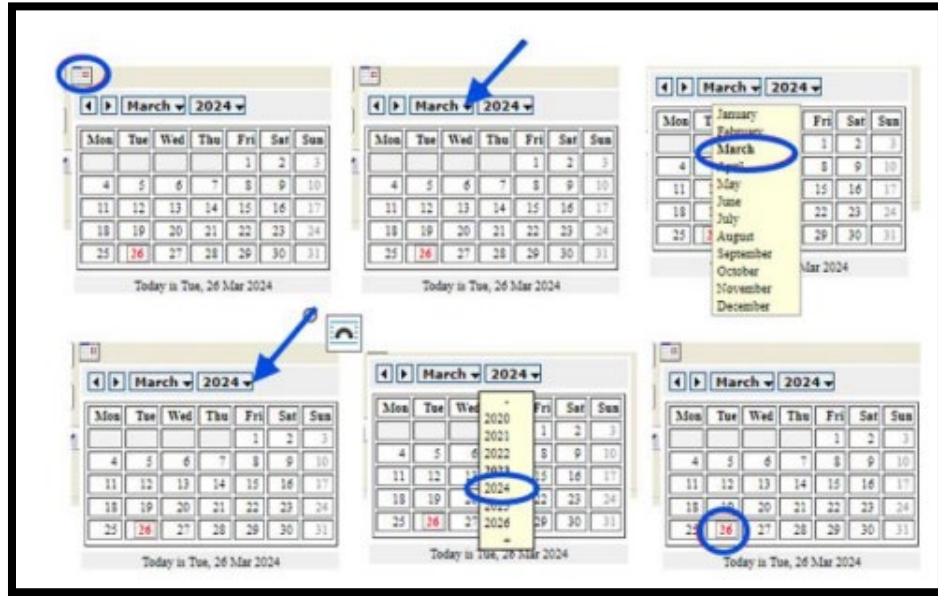


- Service Status: use the dropdown to check the appropriate service status(es).



- Start Date: the date that the authorization(s) started through the date selected as the End Date.

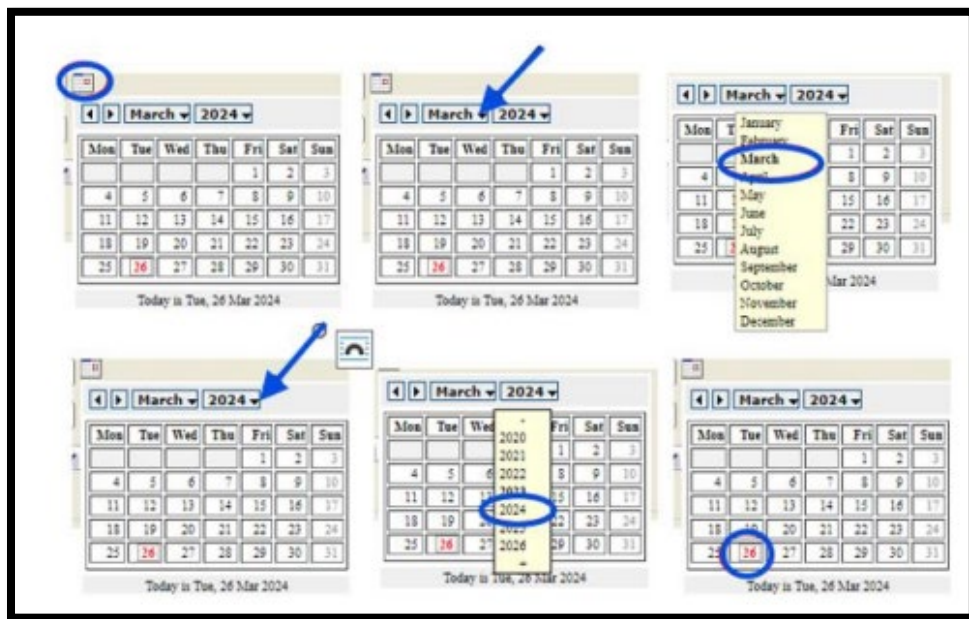
A date must be selected by clicking on the appropriate date located in the calendar icon. Select the month and year by clicking on the corresponding dropdown menus, and then select the date by clicking on it.



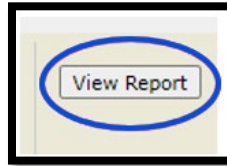
d. End Date: the end date of the authorization(s) or early depending on the Start Date selected.

A date must be selected by clicking on the appropriate date located in the calendar icon. Select the month and year by clicking on the corresponding drop-down menus, and then select the date by clicking on it.

To collect all authorizations throughout the fiscal year, Start Date = to 07/01/20YY (beginning of fiscal year) to End Date = 06/30/20YY (end of fiscal year).



4. Click View Report to execute the search.



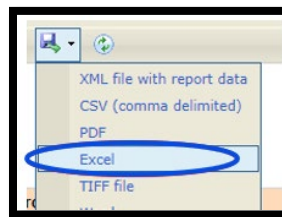
5. A report will generate. The report can be viewed on the screen or exported.



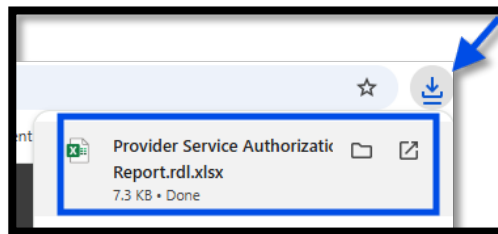
6. To export the report, go to the caret next to the Save icon.



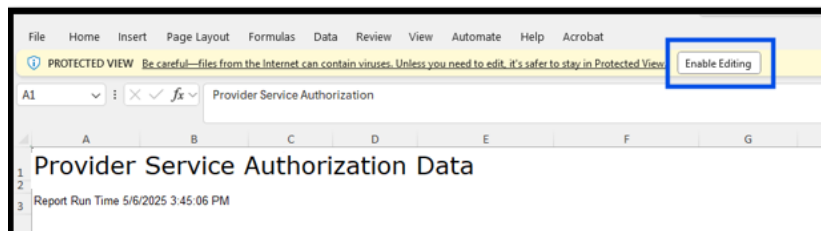
a. Select **Excel**.



b. The Excel report will download. Click the report from the computer's downloads.



c. Once the Excel report displays, click the **Enable Editing** button.



7. Review/filter report as needed. Utilize the [How to Add Filters to iConnect Reports Job Aid](#) for additional assistance in filtering an iConnect report.