

Documenting Services using the Provider Documentation tab of the Consumer's Record – Residential, LSD 3, and LSD 4

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.

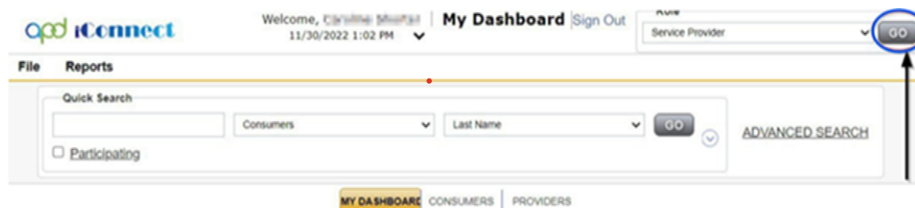
This job aid will encompass using iConnect to record services using the Provider Documentation Tab of the Consumer's record for Residential services, Life Skills Development (LSD) 3 Adult Day Training (ADT), and LSD 4 Prevocational services. If services are required to use the EVV system, this aid will 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.).

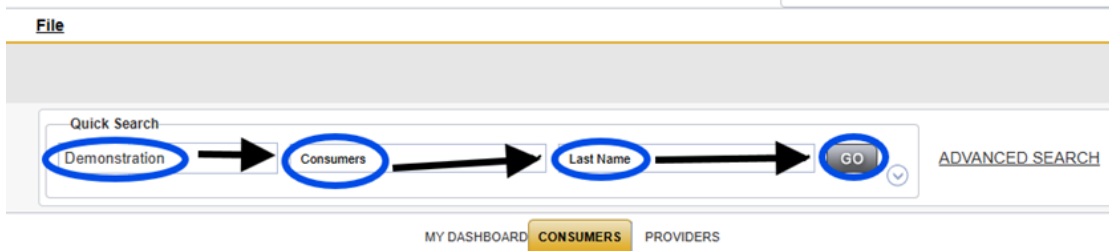
Please refer to the [Developmental Disabilities Individual Budgeting Waiver Services Coverage and Limitations Handbook](#) for specific documentation requirements. Services provided after the implementation of iConnect must be added to iConnect prior to billing. Once a service is live in iConnect, the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

Intro to completing Provider Documentation Screens with detailed images

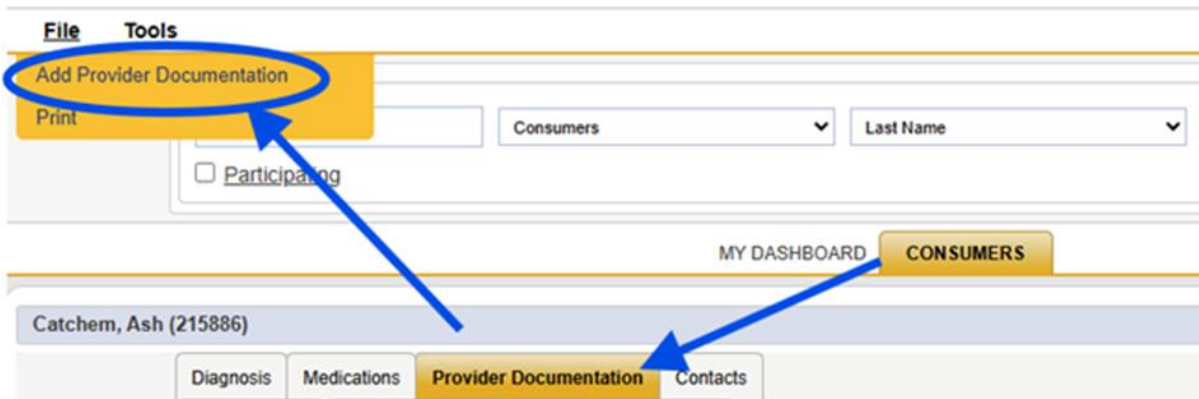
1. To begin, log into iConnect and set Role = **Service Provider** or **Service Provider Worker**. Click **Go**



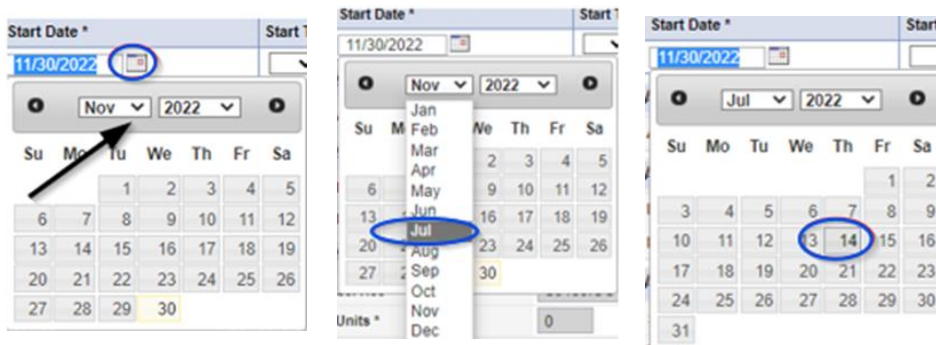
2. Navigate to the Consumer's record.
 - a. Type the consumer's last name in the Quick Search text field (first field on the left)
 - b. Ensure that the second field contains Consumers, third field contains last name and click "Go"



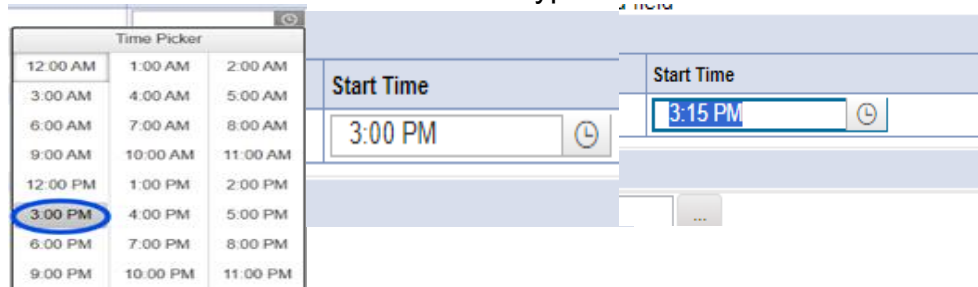
3. Click the **Provider Documentation** tab > click **File** > **Add Provider Documentation**.



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	
10/01/2025	7:45 AM	10/01/2025	2:15 PM	390	Delete
10/21/2025		10/21/2025			Add

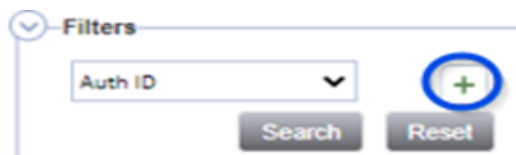
Notice a new line that appears for dates and times, do not add a second date unless instructed otherwise. (*Documentation of DAILY attendance IS required for LSD 3 & 4*).

Start Date *	Start Time	End Date *	End Time	Total Minutes	
10/01/2025	7:45 AM	10/01/2025	2:15 PM	390	Delete
10/03/2025	7:52 AM	10/03/2025	2:05 PM	373	Delete
10/03/2025	8:01 AM	10/03/2025	2:06 PM	365	Delete
10/21/2025		10/21/2025			Add

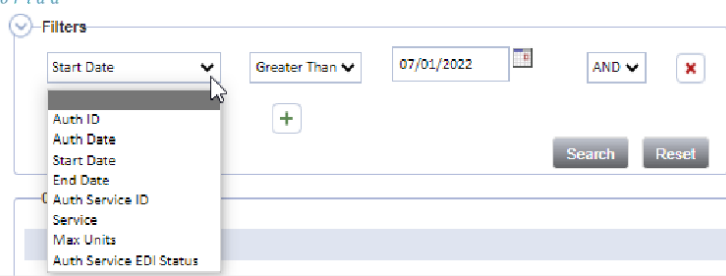
5. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations. There are specific circumstances in which you may skip this step, but that will be listed in the documentation specific instructions.



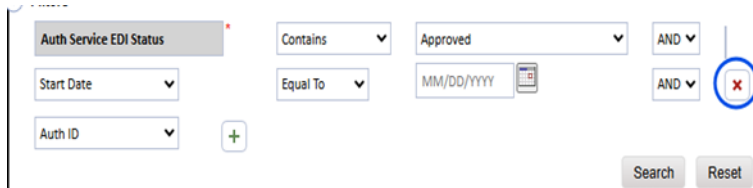
- a. Using the Filter Options can assist with locating the necessary Auth ID.
- b. Use the Green + to add filters.



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



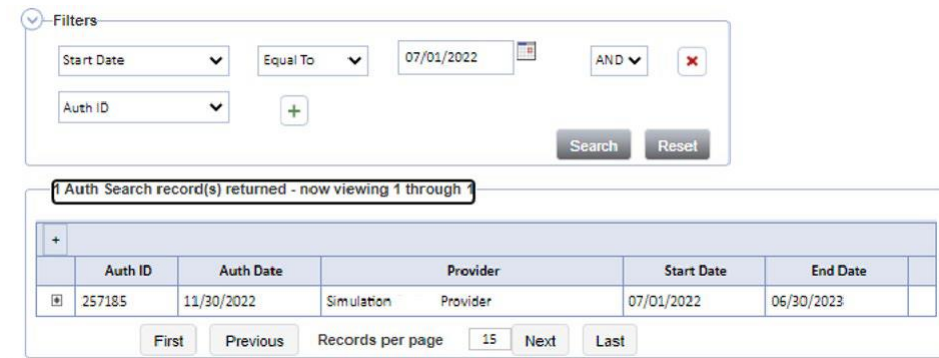
d. Use the Red X to remove filters.



e. Click the **Search** button.

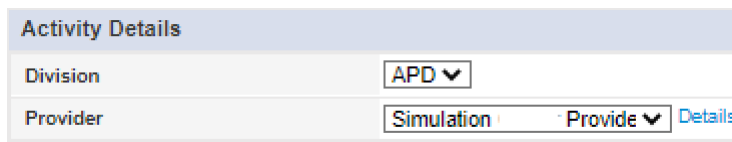
6. Click the Authorization.

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



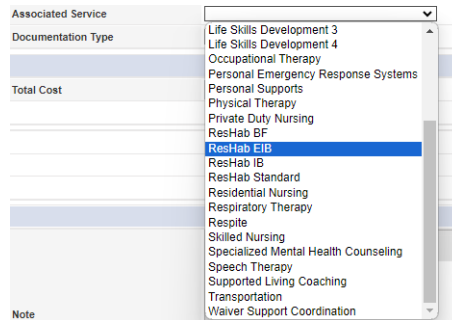
Auth ID	Auth Date	Provider	Start Date	End Date
257185	11/30/2022	Simulation Provider	07/01/2022	06/30/2023

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

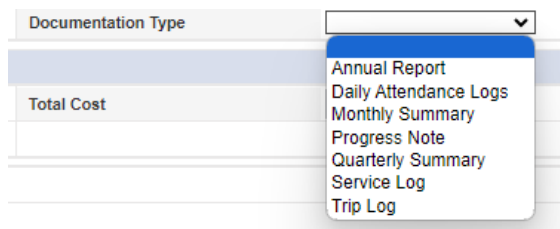


9. Worker name defaults to the user signed into iConnect at the time of entry. If the Worker needs to be updated please proceed to [As Needed: Updating the Worker Name](#).

10. 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.



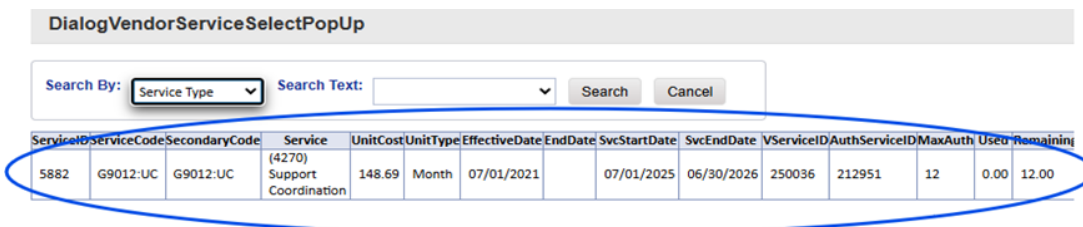
11. Documentation Type can be chosen when inputting Annual Report, Quarterly Report and any other provider documentation for quick reference in the Provider Documentation tab of the Consumer's Record. Select the appropriate documentation type associated with the provider documentation from the drop-down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



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



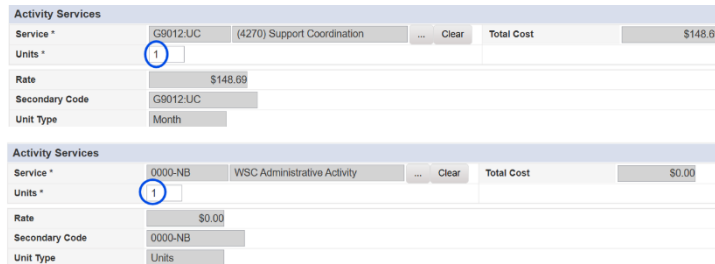
a. Select the Service.



13. The Activity Services details are populated on the Provider Documentation details page. *(When documenting for LSD 3 & 4, be sure to differentiate between the Monthly rate and the Hourly rate.)*

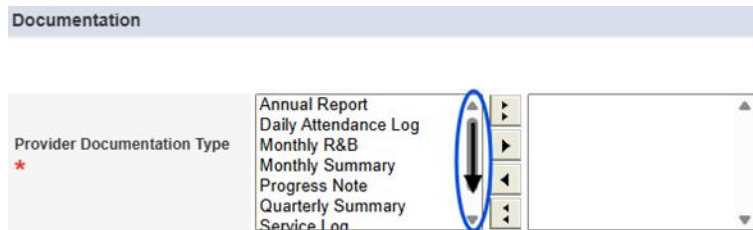
14. Verify/update the number of Units as needed. Some services are programmed to populate this field, whereas other services are not programmed to populate this field. (Residential Habilitation and Life Skills 3 & 4)

- 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.

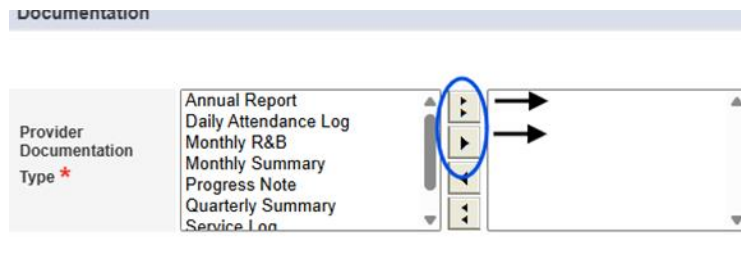


15. Provider Documentation Type = Select as needed.

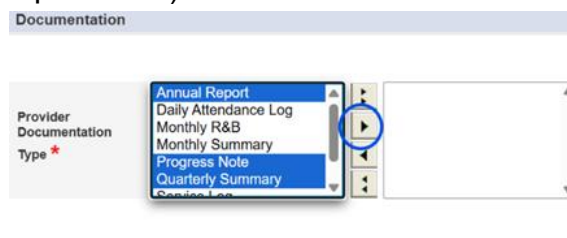
- a. Use the scrollbar to see all the selections.



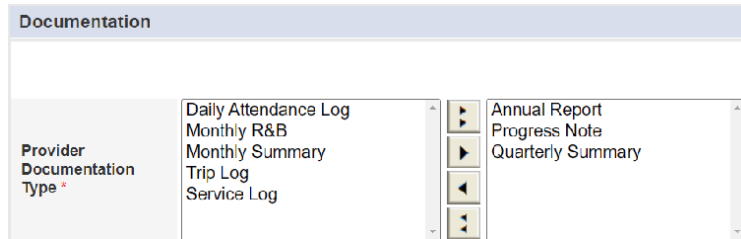
- b. The caret pointing to the right will move selections to the box on the right.
 - i. Single caret moves the selected options.
 - ii. Double carets move all the items.



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

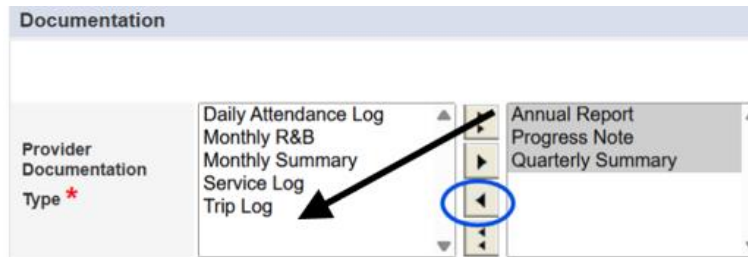


d. Selections should be moved to the box on the right.

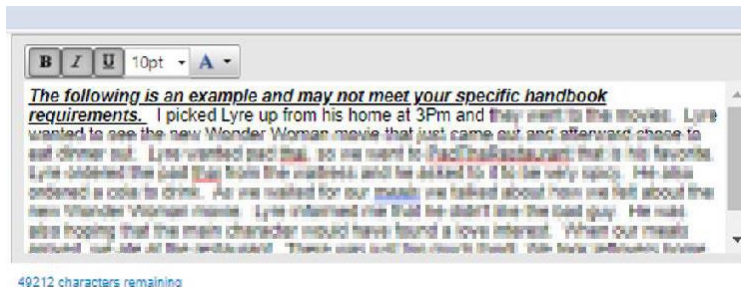


e. If incorrect selections were made, use the caret pointing to the left to move those selections back into the original menu on the left.

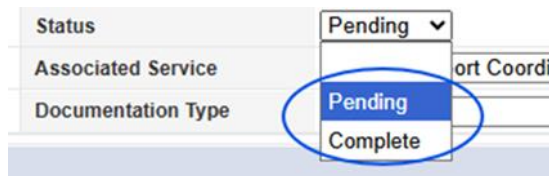
- i. Single caret moves the selected options.
- ii. Double carets move all the items.



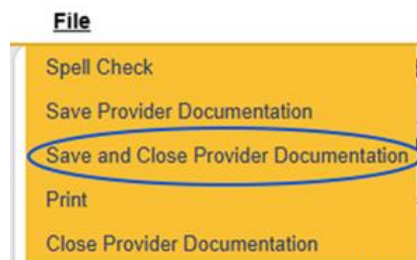
16. Note - Enter details of the services provided to the consumer by typing in the text box.



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



18. 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

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

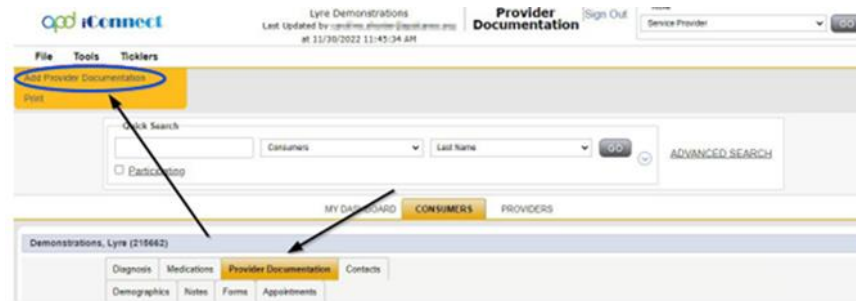
Notice that Attendance Logs are unique in that one provider documentation activity will contain multiple dates, depending on the type of service provided.

- *Daily Attendance Logs for ResHab Services at the Monthly rate will contain all dates of service for the month.*
 - *ResHab Services must be 24+ days to use the monthly rate. If the Service provides less than 24 days, the service must use the daily rate.*
- *Daily Attendance Logs for ResHab Services at the Daily rate will contain all dates of service for the month.*
 - *ResHab Services must be 24+ days to use the monthly rate. If the Service provides less than 24 days, the service must use the daily rate.*
- *Daily Attendance Logs for LSD3 and LSD4 Services at the Monthly rate will contain all dates of service for the month.*
 - *LSD 3 & 4 Services must be 80 hours to use the monthly rate. If the Service provides less than 80 hours, the service must use the hourly rate.*
- *Daily Attendance Logs for LSD3 and LSD4 Services at the Hourly rate will contain all dates of service for the month.*
 - *LSD 3 & 4 Services under 80 hours is to use the hourly rate. Once services reach 80 hours within the month, the provider is to use the monthly rate.*

IMPORTANT: *To avoid duplicating work, Providers with clients with the monthly rate for LSD 3 or LSD 4 services may want to wait until the client has reached the 80 hours of the LSD 3 or LSD 4 service to input the daily attendance log into iConnect.*

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: Repeat this step to add all the days in which this individual received services for

- **the month when documenting daily attendance for LSD3 and LSD4**
 - Additionally, when LSD3 or LSD4 services are approved with the monthly rate or the hourly rate, each date along with the start time and end time are to be documented.
 - For example:
 - 10/01/2025 9:00AM - 10/01/2025 3:00PM
 - 10/02/2025 9:00AM - 10/02/2025 3:00PM
 - 10/03/2025 9:00AM - 10/03/2025 3:00PM
 - 10/04/2025 9:00AM - 10/04/2025 1:00PM
 - 10/08/2025 11:00AM - 10/08/2025 5:00PM

IMPORTANT: When adding the daily attendance log at the end of the month, verify the hours used. If the hours are 80 hours or more, utilize the monthly service code authorization. If the hours are less than 80 hours, utilize the hourly rate if available. If there is no authorization for the hourly rate, proceed to Daily Attendance Logs – 0000-WVR – TEMPORARY – EFFECTIVE UNTIL 12/31/2026.

- **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

Document Services using the Provider Documentation tab

be the last day of the month (ie: intervals).

- For example:

01/01/2024 12:00AM - 01/31/2024, 11:59PM

- If an individual is not at the home during specific dates within the month, then there will be multiple intervals.

- 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

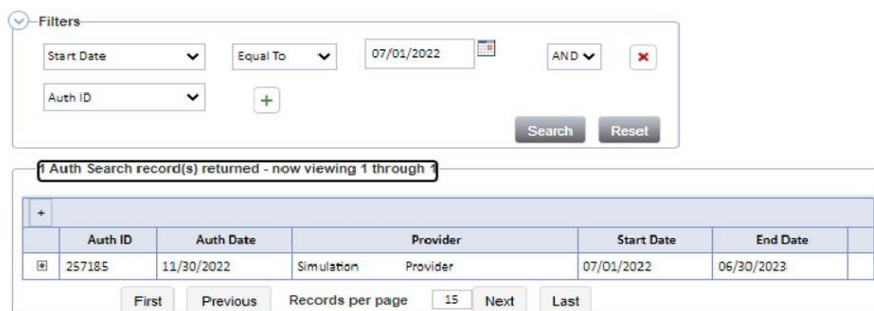
4. Click the box next to the Auth ID field that contains an ellipsis (three dots) to display a list of authorizations.



IMPORTANT: Ensure the appropriate Authorization ID is chosen for the appropriate timeframe of service provided. When documenting for LSD 3 & 4, be sure to differentiate between the Monthly rate and the Hourly rate. If there is no Hourly rate authorization, proceed to Daily Attendance Logs – 0000-WVR – TEMPORARY – EFFECTIVE UNTIL 12/31/2026.

5. Click the Authorization.

- a. The Authorization ID will populate on the Provider Documentation details page.

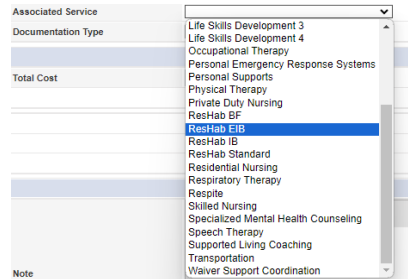


6. The Authorization ID will populate on the Provider Documentation details page.

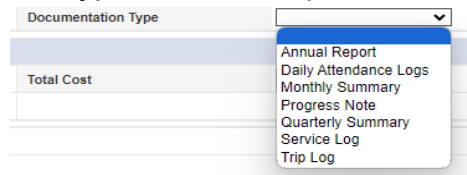
7. Worker name defaults to the user signed into iConnect at the time of entry. If the

Worker needs to be updated please proceed to [As Needed: Updating the Worker Name](#).

8. Add the Associated Service from the drop-down menu.



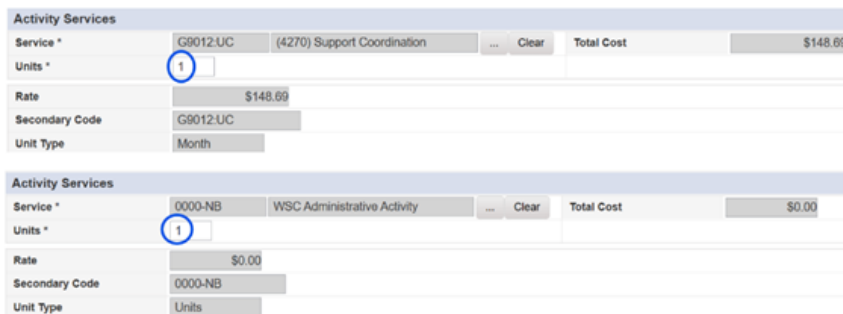
9. Add the Documentation Type from the drop-down menu.



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

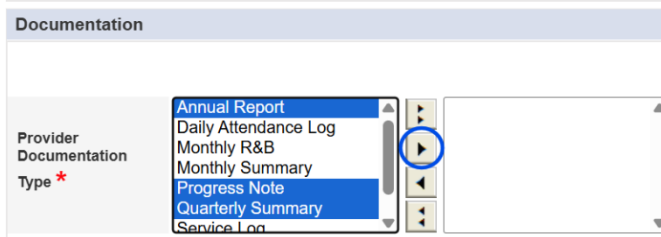


11. Verify the number of Units is populated. If needed, populate this with the quantity of units being documented (ex. Monthly ResHab and LSD 3 & 4 services require manual entry). Note the Total Cost value changes as the number of Units change.



12. Provider Documentation Type = Select Daily Attendance Log.

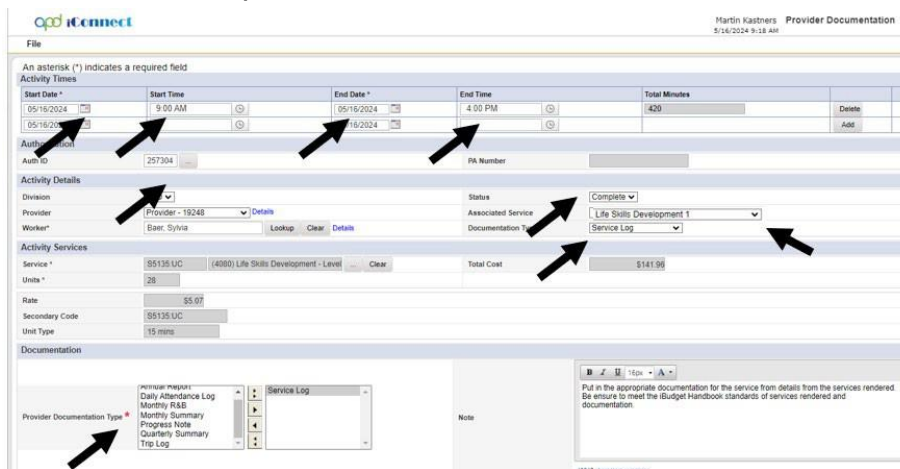
a. If additional selections are needed, make those additional selections too.



12. 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.

a. 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.

13. Status = Complete.

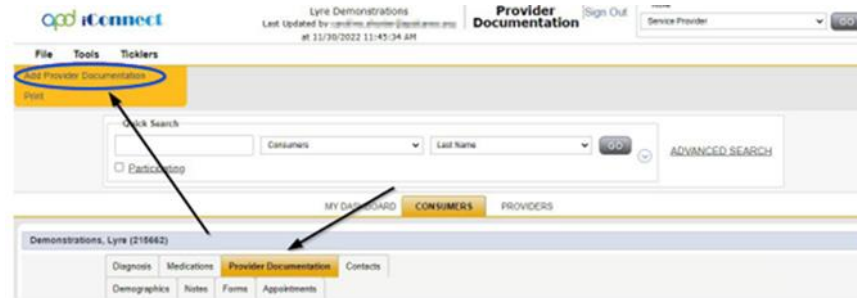


14. Click **File > Save and Close Provider Documentation.**

Daily Attendance Logs – 0000-WVR – TEMPORARY – EFFECTIVE UNTIL 12/31/2026

If a client has an authorization for the Monthly LSD 3 or LSD 4 service and the client does not attend the service the minimum of 80 hours in a month, the provider will need to utilize the hourly service code. If the client does not have an hourly authorization for LSD 3 or LSD 4 the provider may proceed 0000-WVR service code as outlined below.

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**.

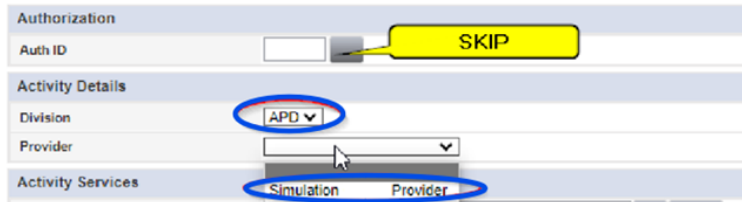
IMPORTANT: Repeat this step to add all the days in which this individual received services for in the month.

- For example:
 - 10/01/2025 9:00AM - 10/01/2025 3:00PM
 - 10/02/2025 9:00AM - 10/02/2025 3:00PM
 - 10/03/2025 9:00AM - 10/03/2025 3:00PM
 - 10/04/2025 9:00AM - 10/04/2025 1:00PM
 - 10/08/2025 11:00AM - 10/08/2025 5:00PM

4. **SKIP** the AUTH ID Section.

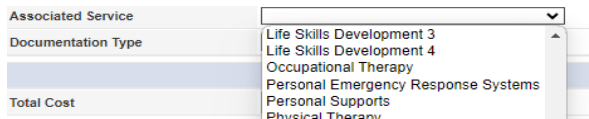
5. Since the Auth usually populates the following fields, make sure to complete the following additional sections (select from dropdown menu).

- a. Division = APD
- b. Provider = The organization represented (If the Provider Name does not populate, contact the WSC to add a Provider Selection Record for your Agency.)

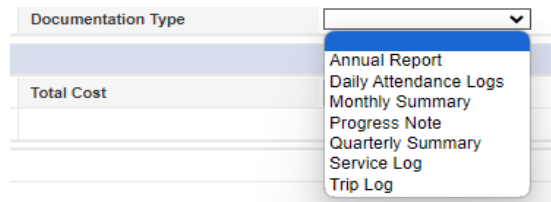


- c. Worker name defaults to the user signed into iConnect at the time of entry. If the Worker needs to be updated please proceed to [As Needed: Updating the Worker Name](#).

6. Associated Service select the appropriate service, Life Skills Development 3 or Life Skills Development 4 from the drop-down menu.



7. Documentation Type = **Daily Attendance Log**.

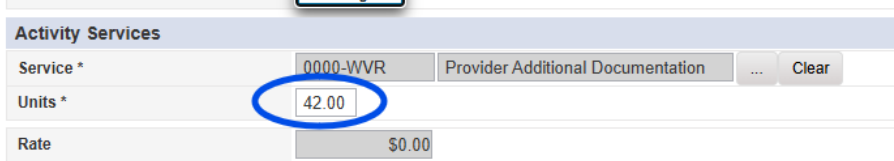


8. Click the box next to the Service field that contains an ellipsis (three dots) to display a list of services for this authorization. Select the 0000-WVR Service.



If the 0000-WVR Service is not available – contact your Provider Enrollment Liaison.

9. Update the number of units to equal the hours used in the attendance log.



Activity Services

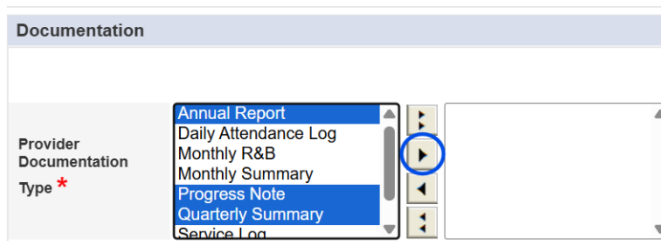
Service * 0000-WVR Provider Additional Documentation ... Clear

Units * 42.00

Rate \$0.00

10. Provider Documentation Type = Select Daily Attendance Log.

a. If additional selections are needed, make those additional selections too.



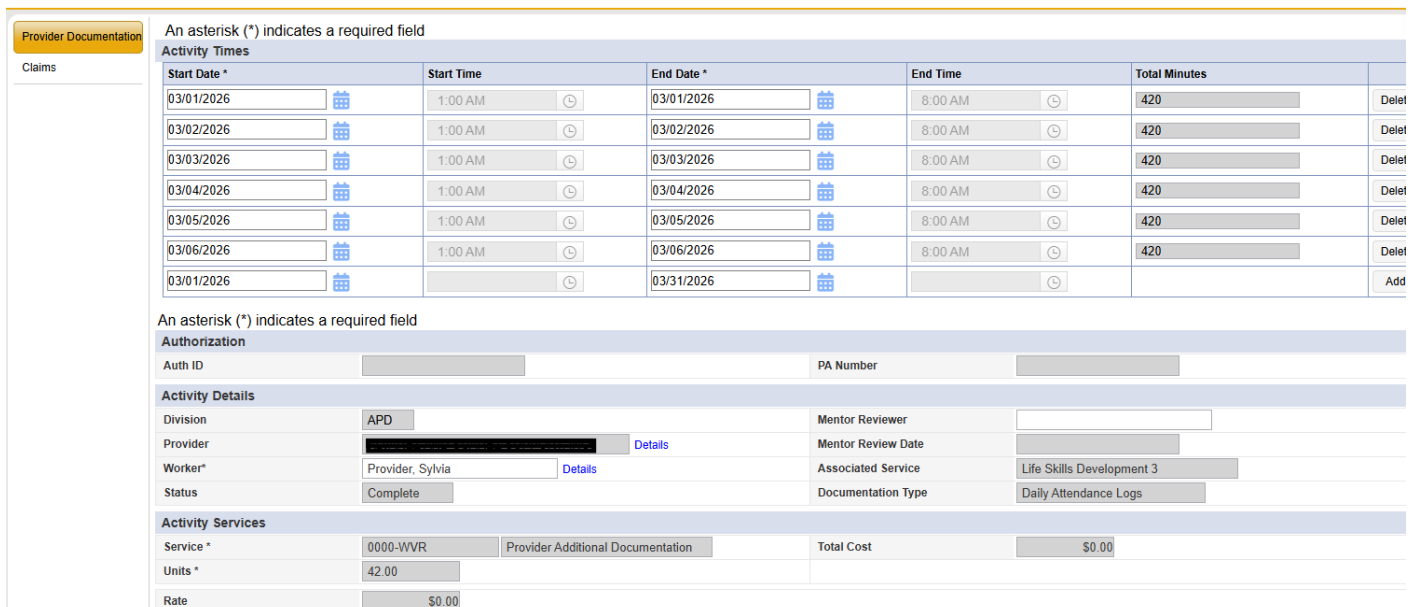
Documentation

Provider Documentation Type *

- Annual Report
- Daily Attendance Log
- Monthly R&B
- Monthly Summary
- Progress Note
- Quarterly Summary
- Service Log

11. Note = Notes - in accordance with the iBudget handbook.

12. Status = **Complete**



Provider Documentation

An asterisk (*) indicates a required field

Start Date *	Start Time	End Date *	End Time	Total Minutes	
03/01/2026	1:00 AM	03/01/2026	8:00 AM	420	Delet
03/02/2026	1:00 AM	03/02/2026	8:00 AM	420	Delet
03/03/2026	1:00 AM	03/03/2026	8:00 AM	420	Delet
03/04/2026	1:00 AM	03/04/2026	8:00 AM	420	Delet
03/05/2026	1:00 AM	03/05/2026	8:00 AM	420	Delet
03/06/2026	1:00 AM	03/06/2026	8:00 AM	420	Delet
03/01/2026		03/31/2026			Add

An asterisk (*) indicates a required field

Authorization

Auth ID PA Number

Activity Details

Division APD Mentor Reviewer

Provider [Redacted] Details Mentor Review Date

Worker* Provider, Sylvia Details Associated Service Life Skills Development 3

Status Complete Documentation Type Daily Attendance Logs

Activity Services

Service * 0000-WVR Provider Additional Documentation Total Cost \$0.00

Units * 42.00

Rate \$0.00

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

Monthly Summary

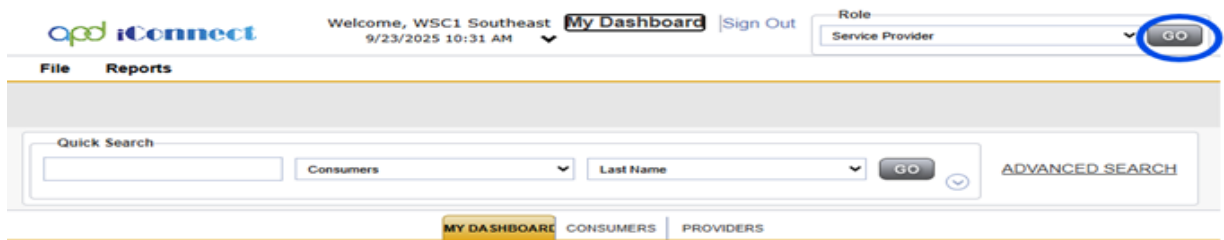
A monthly summary is a written summary of the activities that took place during each month, including the consumer's progress toward achieving goals. **Add the Monthly Summary as a separate activity using the 0000-WVR Code.**

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

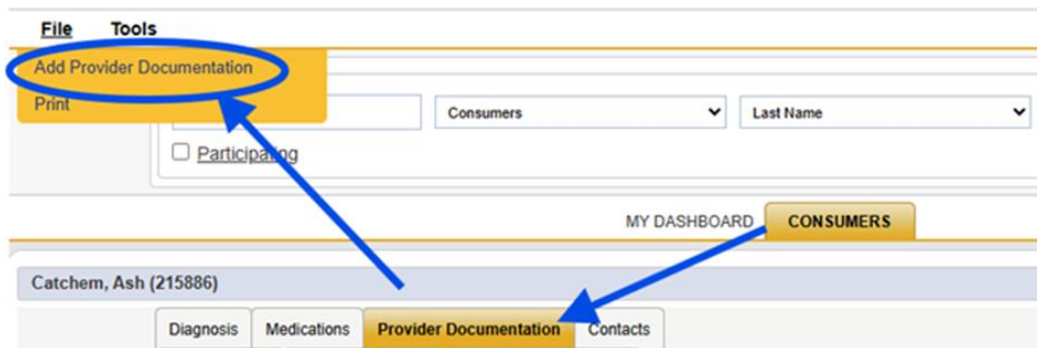
For ResHab Providers: Monthly summaries may be submitted if the provider chooses to do a monthly summary each month rather than a quarterly summary

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**.

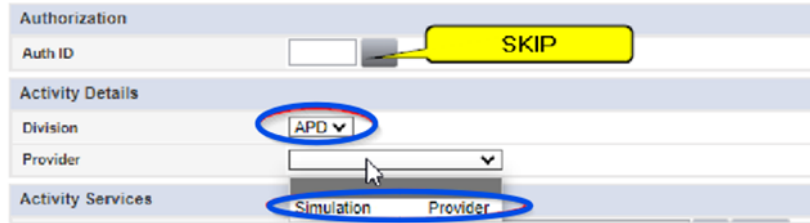


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 - a. Start Date: Select the Date of Service.
 - b. Start Time: Select the start time of the service
 - c. End Date: Select the Date of Service.
 - d. End Time: Select the end time of the service
 - e. Click **Add**.

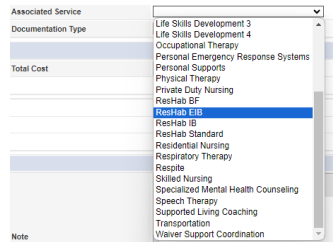
4. **SKIP** the AUTH ID Section

5. Since the Auth usually populates the following fields, make sure to complete the following additional sections (select from dropdown menu).

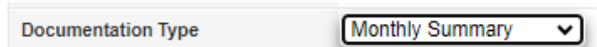
- a. Division = APD
- b. Provider = The organization represented



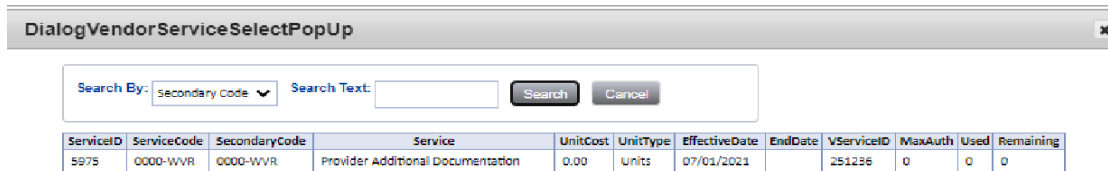
- c. Worker name defaults to the user signed into iConnect at the time of entry. If the Worker needs to be updated please proceed to [As Needed: Updating the Worker Name](#).
6. Associated Service can be chosen when inputting Annual Report, Quarterly Report, and any other provider documentation for quick 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.



7. Documentation Type choose Monthly Summary.



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 0000-WVR Service.



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.

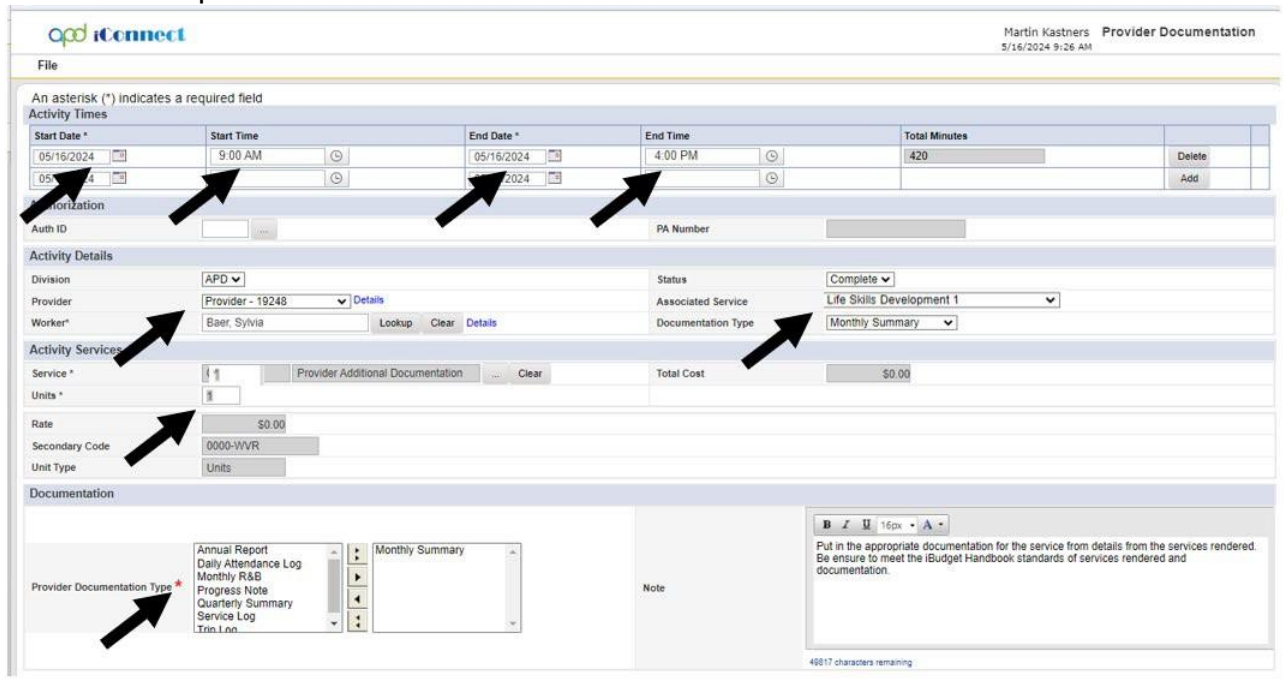
9. Update the number of units to 1.

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

10. Provider Documentation Type = Monthly Summary

11. 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.

12. Status = Complete



The screenshot shows the 'Provider Documentation' form in the APD iConnect system. The form is titled 'Provider Documentation' and includes a 'File' menu. The main content area 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, Start Time, End Date, and End Time fields.
- Authorization:** Fields for Auth ID and PA Number.
- Activity Details:** Fields for Division (APD), Provider (Provider - 19248), Worker* (Baer, Sylvia), Status (Complete), Associated Service (Life Skills Development 1), and Documentation Type (Monthly Summary). Arrows point to the Status, Associated Service, and Documentation Type fields.
- Activity Services:** Fields for Service *, Units *, Rate (\$0.00), Secondary Code (0000-WVR), and Unit Type (Units). Arrows point to the Units *, Rate, and Secondary Code fields.
- Documentation:** A dropdown menu for Provider Documentation Type with 'Monthly Summary' selected. An arrow points to this dropdown.
- Note:** A text area for entering a summary of activities, with a character count of 488/17 characters remaining.

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

Quarterly Summary

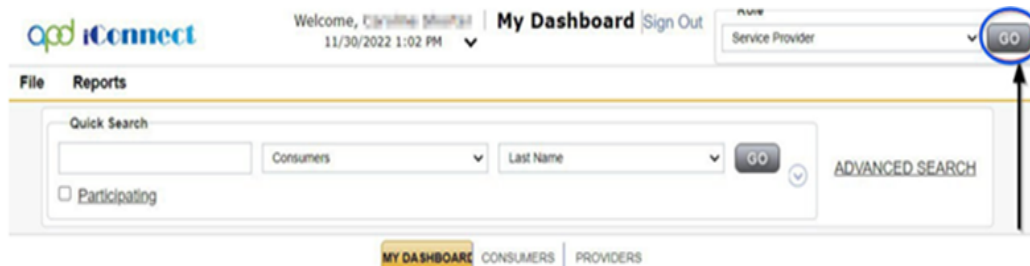
A quarterly summary is a written summary of the activities that took place during each quarter, including the consumer's progress toward achieving goals. The third quarterly summary is also the annual report. **The third quarterly summary also serves as the annual report and must include a summary of the previous three quarters.**

Add the Quarterly Summary as a separate activity using the 0000-WVR Code.

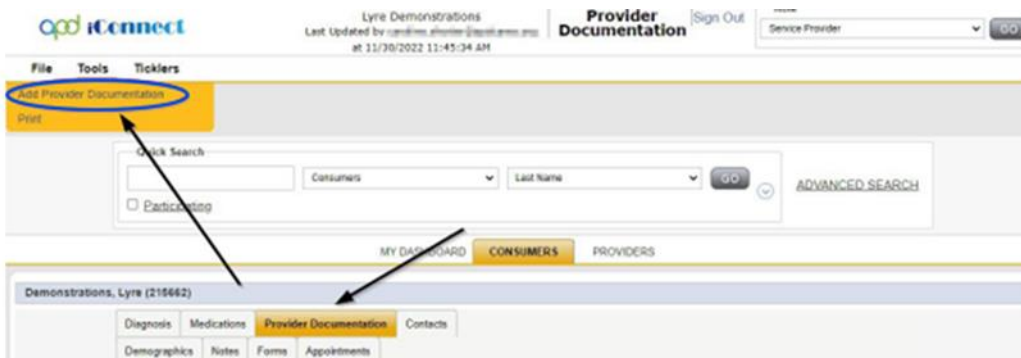
Please refer to [the Intro to completing Provider Documentation Screens with detailed images for instructions](#) on how to complete each field.

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**.

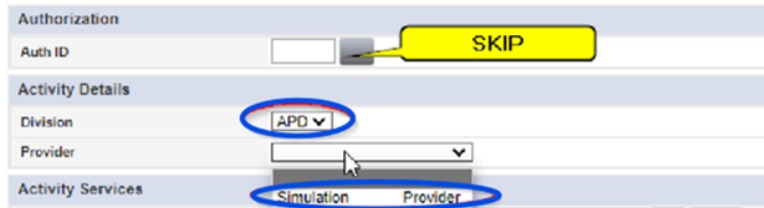


2. Navigate to the Consumer's record and click the **Provider Documentation** tab > click **File > Add Provider Documentation**.

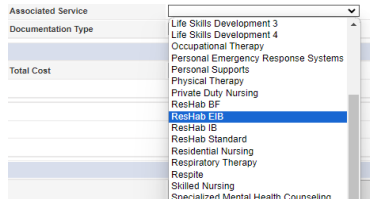


3. The Provider Documentation Details page is displayed. Update the following fields:
 - a. Start Date: Select the Date of Service.
 - b. Start Time: Select the start time of the service
 - c. End Date: Select the Date of Service.
 - d. End Time: Select the end time of the service
 - e. Click **Add**.

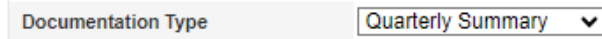
4. **SKIP** the AUTH ID Section
5. Since the Auth usually populates the following fields, make sure to complete the following additional sections (select from dropdown menu).
 - a. Division = APD
 - b. Provider = The organization represented



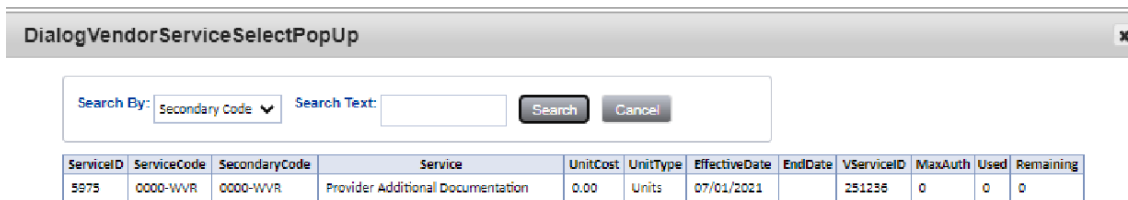
- c. Worker name defaults to the user signed into iConnect at the time of entry. If the Worker needs to be updated please proceed to [As Needed: Updating the Worker Name](#).
6. Select the appropriate service associated with the provider documentation from the drop-down menu.



7. Documentation Type will be Quarterly Summary.



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 0000-WVR Service.



ServiceID	ServiceCode	SecondaryCode	Service	UnitCost	UnitType	EffectiveDate	EndDate	VServiceID	MaxAuth	Used	Remaining
5875	0000-WVR	0000-WVR	Provider Additional Documentation	0.00	Units	07/01/2021		251238	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.

9. Update the number of units to 1.

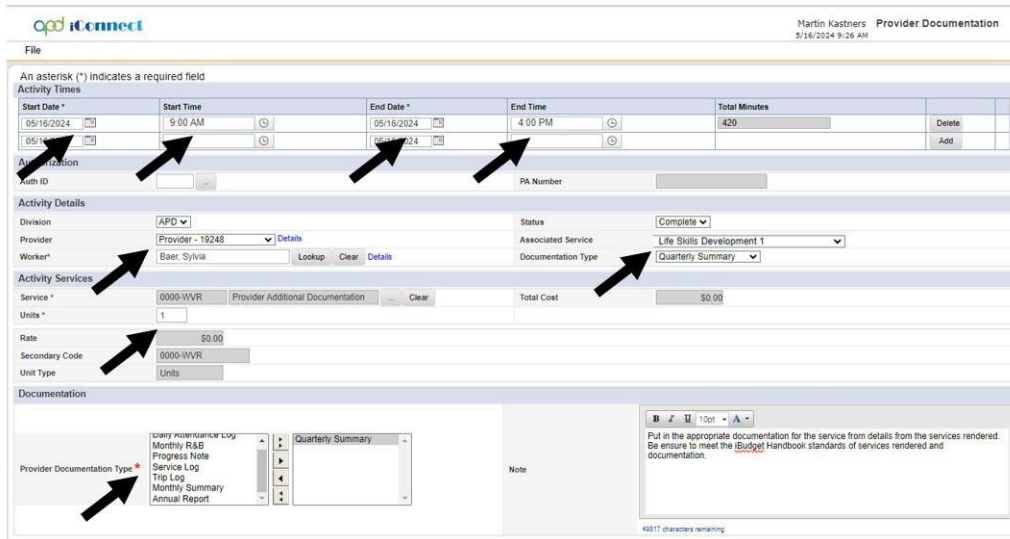
Activity Services			
Service *	0000-WVR	Provider Additional Documentation	Clear
Units *	1		Total Cost \$0.00
Rate	\$0.00		
Secondary Code	0000-WVR		
Unit Type	Units		

10. Provider Documentation Type = Quarterly Summary

11. 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.

12. Status = Complete

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



The screenshot shows the 'Provider Documentation' form in the iConnect system. Arrows point to the following fields:

- Activity Times:** Start Date (05/16/2024), Start Time (9:00 AM), End Date (05/16/2024), End Time (4:00 PM), and Total Minutes (420).
- Activity Details:** Division (APD), Provider (19248), Worker (Baer, Sylvia), Status (Complete), Associated Service (Life Skills Development 1), and Documentation Type (Quarterly Summary).
- Activity Services:** Service (0000-WVR), Units (1), Rate (\$0.00), Secondary Code (0000-WVR), and Unit Type (Units).
- Documentation:** Provider Documentation Type (Quarterly Summary) and a Note field with a character count of 488/17.

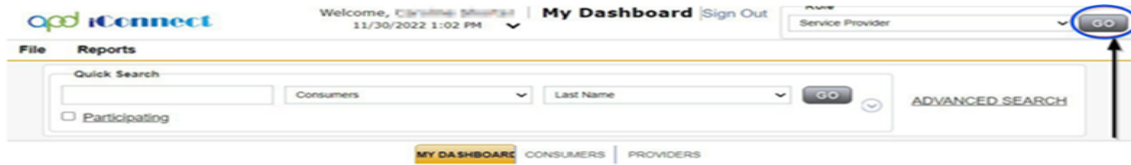
Annual Report

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.**

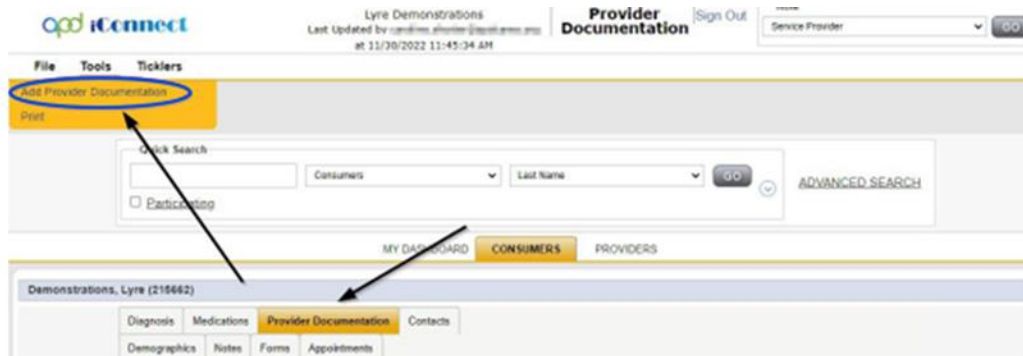
Please refer to [the Intro to completing Provider Documentation Screens with detailed images for instructions](#) on how to complete each field.

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**.

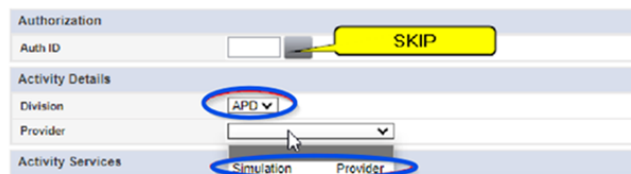


3. The Provider Documentation Details page is displayed. Update the following fields:
 - a. Start Date: Select the Date of Service.
 - b. Start Time: Select the start time of the service
 - c. End Date: Select the Date of Service.
 - d. End Time: Select the end time of the service
 - e. Click **Add**.

4. **SKIP** the AUTH ID Section

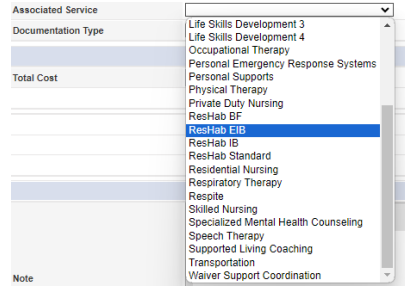
5. Since the Auth usually populates the following fields, make sure to complete the following additional sections (select from dropdown menu).

- a. Division = APD
- b. Provider = The organization represented

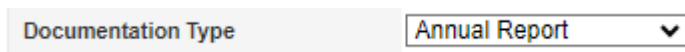


- c. Worker name defaults to the user signed into iConnect at the time of entry. If the Worker needs to be updated please proceed to [As Needed: Updating the Worker Name](#).

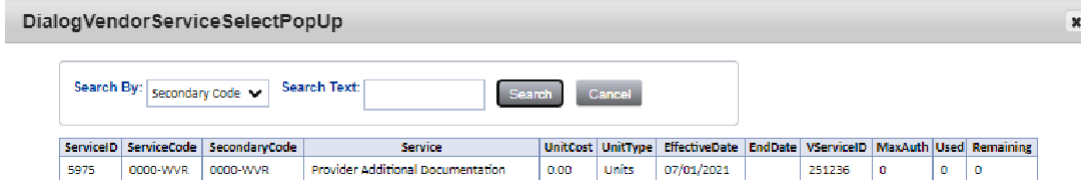
- Select the appropriate service associated with the provider documentation from the drop-down menu.



- Documentation Type will be Annual Report.

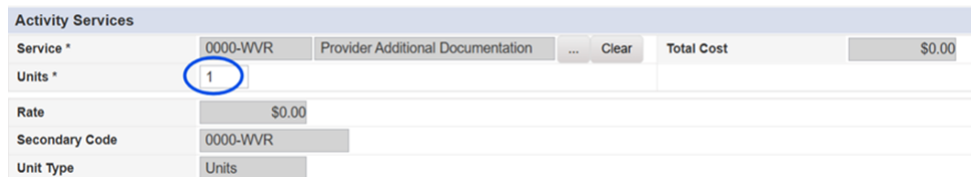


- Click the box next to the Service field that contains an ellipsis (three dots) to display a list of services for this authorization. Select the 0000-WVR Service.



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.

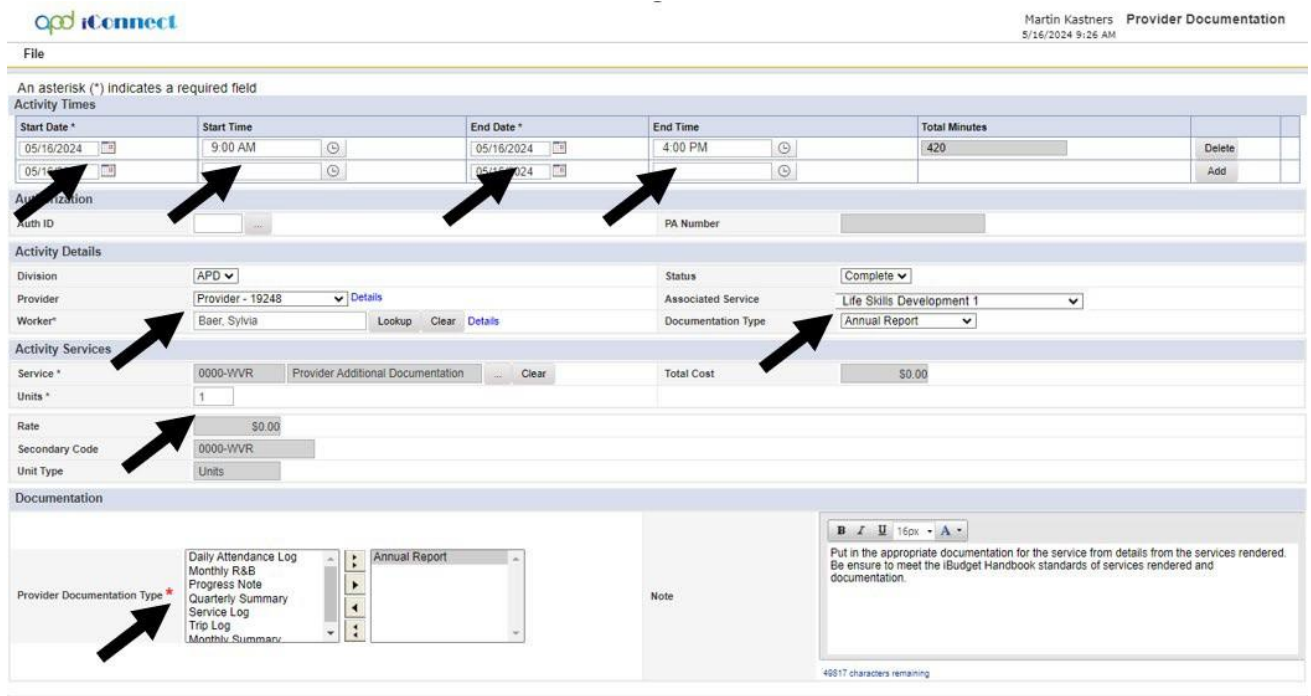
- Update the number of units to 1.



- Provider Documentation Type = Annual Report

- 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.

12. Status = Complete



The screenshot shows the 'Provider Documentation' form in the iConnect system. The form is titled 'Provider Documentation' and includes a 'File' menu. 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, Start Time, End Date, and End Time fields.
- Authorization:** Fields for Auth ID and PA Number.
- Activity Details:** Fields for Division (APD), Provider (Provider - 19248), Worker* (Baer, Sylvia), Status (Complete), Associated Service (Life Skills Development 1), and Documentation Type (Annual Report). Arrows point to the Worker* and Documentation Type fields.
- Activity Services:** Fields for Service* (0000-WVR), Units* (1), Rate (\$0.00), and Secondary Code (0000-WVR). Arrows point to the Service* and Rate fields.
- Documentation:** A section for 'Provider Documentation Type*' with a dropdown menu showing options like Daily Attendance Log, Monthly R&B, Progress Note, Quarterly Summary, Service Log, Trip Log, and Monthly Summary. An arrow points to this dropdown. To the right is a 'Note' field with a character count of 48617 characters remaining.

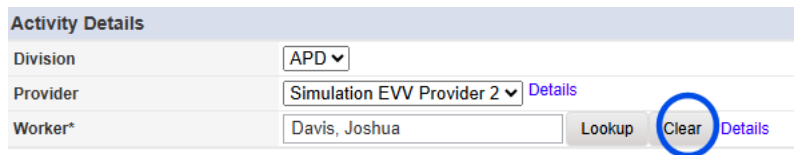
13. Click **File > Save and Close Provider Documentation**.

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.

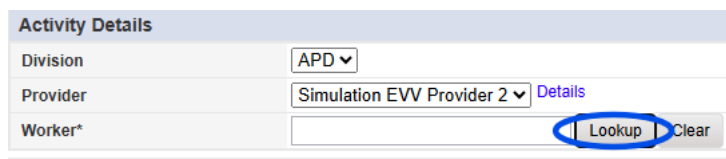
NOTE: The following can only be completed if the worker that rendered the service has signed into iConnect at least once and their name appears in the Workers tab of the Provider record. If their name is not in the Workers tab, the user will be able to note the Worker in the Note section of the Provider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

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



The screenshot shows the 'Activity Details' section of the form. The 'Worker*' field contains the name 'Davis, Joshua'. To the right of the field are buttons for 'Lookup', 'Clear', and 'Details'. The 'Clear' button is circled in blue.

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



The screenshot shows the 'Activity Details' section of the form. The 'Worker*' field is now empty. To the right of the field are buttons for 'Lookup' and 'Clear'. The 'Lookup' button 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*: Training, Worker_SE1 [Details](#)