

EasyTrac™ Administrator Manual

Provides guidance to maintain and review student and user compliance data and demographics, entered service logs, and available reports.

November 2020

| | |
|---|-----------|
| EASYTRAC™ GENERAL INFORMATION..... | 3 |
| SECURITY..... | 3 |
| NAVIGATION..... | 3 |
| SAVING CHANGES..... | 3 |
| IMPORTANT SYMBOLS AND ICONS IN EASYTRAC™ | 4 |
| HOW TO LOG IN TO EASYTRAC™ | 4 |
| MESSAGE BOARD..... | 5 |
| MESSAGE CENTER..... | 7 |
| DOCUMENTS..... | 7 |
| CHANGING PASSWORDS..... | 7 |
| MANAGING SCHOOLS..... | 9 |
| ADDING SCHOOLS TO EASYTRAC™ | 9 |
| REMOVING SCHOOLS FROM EASYTRAC™ | 9 |
| MANAGING USERS..... | 10 |
| ADDING RELATED SERVICE PROVIDERS TO EASYTRAC™ | 11 |
| ADDING AN ADMINISTRATIVE USER TO EASYTRAC™ | 12 |
| EDITING SUPERVISOR DESIGNATIONS IN EASYTRAC™ | 14 |
| INACTIVATING USERS IN EASYTRAC™ | 15 |
| REACTIVATING USERS IN EASYTRAC™ | 15 |
| MANAGING STUDENTS..... | 16 |
| ADDING STUDENTS TO EASYTRAC™ | 16 |
| ADDING RELATED SERVICES..... | 17 |
| INACTIVATING STUDENTS IN EASYTRAC™ | 18 |
| REACTIVATING STUDENTS IN EASYTRAC™ | 18 |
| ADDING COMPLIANCE DATA..... | 19 |
| PARENTAL CONSENT..... | 19 |
| MEDICAL AUTHORIZATION..... | 20 |
| SPECIAL EDUCATION..... | 21 |
| MANAGING CASELOADS..... | 23 |
| ADD STUDENTS TO A PROVIDERS CASELOAD..... | 23 |
| TRANSFER OR COPY A CASELOAD..... | 25 |
| “ON BEHALF OF” FUNCTION..... | 26 |
| HOW TO USE THE “ON BEHALF OF” FUNCTION..... | 26 |
| ELECTRONIC SIGNATURE VERIFICATION POLICY..... | 27 |
| PAPER LOGS..... | 27 |
| VIEW SERVICE LOG HISTORY VIA STUDENT PROFILE..... | 28 |
| REQUESTING THAT A SERVICE LOG BE REMOVED..... | 29 |
| SERVICE LOG APPROVAL..... | 31 |
| HOW TO USE THE SERVICE LOG APPROVAL WIZARD..... | 31 |
| DOCUMENTS TAB IN STUDENT PROFILE..... | 34 |
| CREATING THE ACCESS BILLING DOCUMENT..... | 34 |
| PRINTING THE ACCESS BILLING DOCUMENT..... | 34 |
| REPORTS IN EASYTRAC™ | 35 |
| ADMINISTRATORS REPORTS IN EASYTRAC™ | 35 |
| LOGGING OUT OF EASY TRAC™ | 38 |
| LOGGING OUT..... | 38 |

EASYTRAC™ GENERAL INFORMATION

The following information discusses the importance of maintaining confidentiality, saving your changes, and how to navigate or move around in the system.

Security

All EasyTrac™ information is confidential. The server uses Secure Socket Layer (SSL) technology to encrypt all information as it flows across the Internet. This is the same technology that online merchants and banks use to protect your credit card number and other sensitive information.

Please adhere to the following procedures to ensure security:

- **Do not give your account name or password to anyone.**
- **Do not write your password down where it can be seen by others.**
- **Do not save documents or reports to an unsecured computer.**
- **Always log off EasyTrac™ and close your browser when you are finished.**

Note: EasyTrac™ will automatically log you out of the system after 60 minutes of inactivity.

Navigation

EasyTrac™ operates from a main navigation menu bar (green) with drop-down menus. Within the drop-down menus there are additional submenu bars (blue) when working with students, users, and school system information. operates from a main navigation menu bar (green) with drop-down menus. Within the drop-down menus there are additional submenu bars (blue) when working with students, users, and school system information.



Saving Changes












After a change is made it is very important to select the 'Update the Database' button at the bottom of each screen to save the changes.



Any information entered will be lost if Users forget to select the 'Update the Database' button!

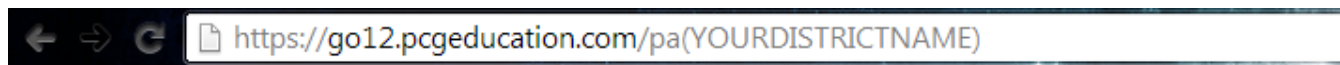
Important Symbols and Icons in EasyTrac™

Throughout EasyTrac™, there are various symbols and icons that appear on many of the system pages. Below is a list of the symbols and their descriptions and functionality.

| | |
|---|--|
|  | <i>Required field in order to save the information in EasyTrac™.</i> |
|  | <i>Drop down menu - Only one selection can be made. Single-select the arrow in the drop-down icon and select an option.</i> |
|  | <i>Check box - More than one selection can be made. To add or remove a check, click once on the box.</i> |
|  | <i>Spell Check icon – Select the icon to launch the spell check function for a specific text box.</i> |
|  | <i>Calendar icon – To add a date, select the calendar and scroll through the screens to find the appropriate date.</i> |
|  | <i>White Check Mark—Special Education eligibility date was not entered for student</i> |
|  | <i>Green Check Mark—Nothing (IEP nor Special Education eligibility) is overdue or coming due</i> |
|  | <i>Red Stop Sign—IEP is overdue</i> |
|  | <i>Yellow Yield Sign—IEP is coming due</i> |
|  | <i>Yellow Yield Sign with a “T”—Tri-Annual/Bi-Annual Eligibility Review is coming due</i> |
|  | <i>Note: The Eligibility Date is not required to be entered for the purposes of SBAP.</i> <i>Red Stop Sign with a “T”—Tri-Annual/Bi-Annual Eligibility Review is overdue</i> <i>Note: The Eligibility Date is not required to be entered for the purposes of SBAP.</i> |

How to Log in to EasyTrac™

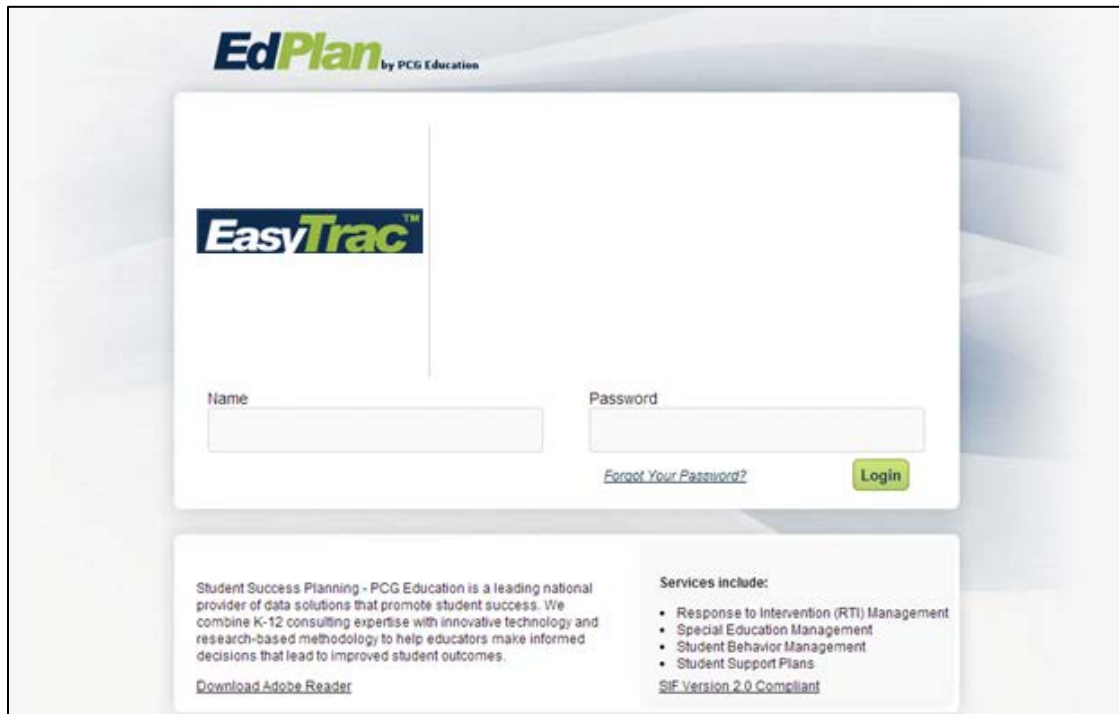
1. Open a web browser and enter your district’s URL in the address bar. We recommend that you save this to your favorites or add a short-cut link to your desktop. You can proceed to the next step to log into the EasyTrac™ site.



My URL is: <https://go12.pcgeducation.com/>

2. Enter your username, this is typically set up as -- (First initial <NO space> Last Name).
3. Enter your password.
4. Select the ‘Login’ button.

Note: *Your username is not case-sensitive.*

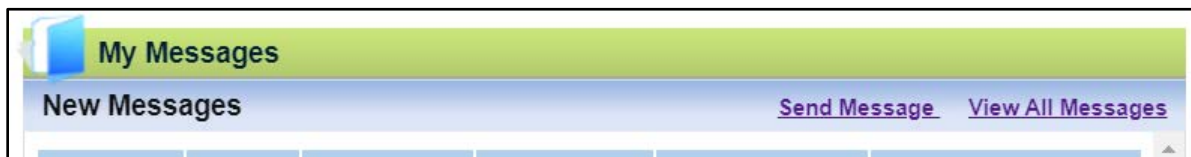


The image shows the EasyTrac login interface. At the top, it says "EdPlan by PCG Education". Below that is the "EasyTrac™" logo. There are two input fields: "Name" and "Password". To the right of the Password field is a "Login" button. Below the Password field is a link that says "Forgot Your Password?". At the bottom, there is a section with text about "Student Success Planning - PCG Education" and a list of "Services include:" which includes "Response to Intervention (RTI) Management", "Special Education Management", "Student Behavior Management", and "Student Support Plans". There are also links for "Download Adobe Reader" and "SIF Version 2.0 Compliant".

Note: This is a web-based system. You can gain access using your username and password through any Internet service provider on any computer with Internet access.

Message Board

To inform Public Consulting Group of any issue, we suggest that users send us a message via one of the following links on the EasyTrac™ *Home Screen*:



The image shows a "My Messages" dashboard. It has a green header with "My Messages" and a blue icon. Below the header is a section titled "New Messages". To the right of "New Messages" are two links: "Send Message" and "View All Messages".

To send a Question, Bug Report, Comment or Suggestion:

1. From the **Home Screen**, select the 'Send Message' link in the My Messages dashboard.
2. Select which type of message you would like from the 'Message Type' drop down box.
3. Type the subject of your message in the 'Subject' box. Be as specific as possible.
4. If it is not already there, enter your email address in the 'Your e-mail address' box so PCG can respond to you. Your e-mail address will automatically populate if your email is entered under the **My Info** tab.
5. Add your message to the text box.
6. Select the 'Send Message' button.

Send us a Message

| | | | |
|-----------------------------|-----------------------|--------------------------|----------------------|
| Message Type: | <div>Question ▼</div> | | |
| Subject: | <input type="text"/> | Your E-Mail Address: | dbest@pcgus.com |
| Page Title (if applicable): | <input type="text"/> | Student (if applicable): | <input type="text"/> |


Enter the Message Here:

Send Message

Once PCG responds to your message, you will receive an e-mail informing you that you have a new message in EasyTrac™. All messages and message responses are sent internally within the system to keep sensitive information secure.

To access your new message, you can do one of the following:

1. Select “View All Messages”
2. Select the message text

 **My Messages**

New Messages

[Send Message](#)
[View All Messages](#)

| From | ID | Date | Message Type | Subject | Message |
|----------------|---------|---------------------|--------------------------|---------------|-----------------------------------|
| AmyLyn Mirocco | 1060497 | 12/12/2019 12:37:00 | Question | RE: Bug Issue | Response to your question ente... |

Either of these methods will direct users to the following screen, which will display New as well as Previous Messages.

New Messages

| Mark as Read? | | From | Site | ID | Date | Message Type | Subject | Message | Age (hr:min) |
|--------------------------|--------------------------|-------------|-----------|--------|---------------------|----------------------------|---------|-----------|--------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Andy Martin | palu13ref | 328636 | 01/08/2015 15:35:00 | Suggestion | RE: | testreply | 0:06 |

Mark Messages as Read

Previous Messages

| From | Site | ID | Date | Message Type | Subject | Message | To | Site | Read? | Replied? | Age (hr:min) |
|------------|-----------------|--------|---------------------|----------------------------|---------|------------|-------------|------------|-------|----------|--------------|
| Devin Best | paeastpennsboro | 328635 | 01/08/2015 15:34:00 | Suggestion | RE: | 3F4305FD35 | Andy Martin | palu111ref | Yes | Yes | 0:07 |

Message Center

At the top of the *Home Screen* is a “Message of the Day” dashboard. This area contains important information for users such as links to training sessions and scheduled system maintenance.

Note: *Check this area often for updates on current requirements and other pertinent information.*



Documents

At the bottom of the *Home Screen* you will see various files that have been made available to you for viewing or downloading. To view a file, select the name of the file. The file will open, and you will have the option of saving it to your computer. When you are finished viewing the file, select the *Main Menu* tab at the top of your screen. Do not close your browser as you are still logged in to EasyTrac™.

Changing Passwords

The first time you log into to EasyTrac™ you will be immediately prompted to change your password.

If you need to change it again once you are signed in, you can do so via the “My Info” option from the *Home Screen*.


To change your password:

1. From the *Navigation Bar* – Select the ‘My Info’ tab.



2. Enter your current password at the top of the screen.
3. Type your new password in both the ‘New Password’ and ‘New Password (to verify)’ fields.
 - a. Please select the “How to Choose a Good Password” hyperlink if you need help creating a strong, appropriate password.
4. Select the ‘Update the Database’ button.

Update Information
Agatha Barkely

 [New Mail!](#)

Please enter your current password: * (required to make any changes on this page)

To change your current password, enter the new password in both of the following areas
 (See [How to choose a good password](#))

New Password:

?

New Password (to verify):

?

| Name: | First | Middle | Last | Suffix |
|-------------------------|--|----------------------|--------------------------------------|------------------------|
| | <input type="text" value="Agatha"/> | <input type="text"/> | <input type="text" value="Barkely"/> | <input type="text"/> * |
| Username: | <input type="text" value="abarkely"/> | | | |
| User Code: | <input type="text" value="0498098"/> | | | |
| ACCESS Provider Number: | <input type="text"/> | | | |
| Title: | <input type="text" value="S/LH"/> ? | | | |
| Address: | <input type="text" value="1234 Test School Dr"/> ? | | | |
| City, State, ZipCode: | <input type="text" value="Somewhere"/> ? | PA ? | <input type="text" value="12345"/> ? | |
| Home Phone: | <input type="text" value="123-456-7890"/> ? | | | |
| Work Phone: | <input type="text" value="012-345-6789"/> ? | | | |
| E-Mail Address: | <input type="text" value="ABarkely@pcgus.com"/> ? | | | |

Set My Forgotten Password Question

Update the Database ?

After updating the database, a confirmation box will display. By selecting 'OK' in the confirmation box, you will have successfully changed your password. The next time you log into EasyTrac™, use your new password.

The 'My Info' tab is also the place where your contact information is stored. Please ensure that your e-mail address and phone number are correct.

District administrators will have the ability to change a password should a service provider forget it and/or are unable to log in. View the "Managing Users" section of this manual for further directions.

MANAGING SCHOOLS

The buildings within the district where students are receiving services are managed internally from the “Schools” tab. Students are required to be assigned to a school building for service documentation to be entered.

Adding Schools to EasyTrac™

1. Select the ‘Schools’ tab at the top of the *Navigation Bar*.
2. Select ‘Add new school’.

Select a School [New Mail!](#)

| | Cp | School Name | Abbrev | Code | Address | City, State Zip | Phone | Fax | Email |
|--|----|------------------------------------|--------|------|-------------|----------------------|--------------|-----|--|
| | | test middle school | TMS | 0001 | 123 test st | harrisburg, PA 17110 | 717-777-7777 | | generalinfo@email.com |

(1 Schools)

Add new school ?

3. Complete the required information and select ‘Update the Database’.

Removing Schools from EasyTrac™

1. Select the ‘Schools’ tab at the top of the *Navigation Bar*.
2. Select the name of the school you wish to remove.
3. Select ‘Delete this School from the database’.

Note: Before a school can be deleted, all students currently assigned must be re-assigned to a new, active school.

Edit School Information
test middle school [New Mail!](#)

| | |
|--|--|
| School Name: | test middle school * |
| Abbreviation: | TMS * |
| <input type="checkbox"/> External School | |
| External School System: | <input type="text"/> (if an External School) |
| School Code: | 0001 ? |
| Type of School: | Middle School * |
| Length of School Day: | 6.50 hour(s) * Edit by Grade |
| Address: | 123 test st ? |
| City, State, ZipCode: | harrisburg ? PA ? 17110 ? |
| Phone Number: | 717-777-7777 ? |
| Fax Number: | <input type="text"/> ? |
| Caller ID: | <input type="text"/> |
| E-Mail Address: | generalinfo@email.com ? |

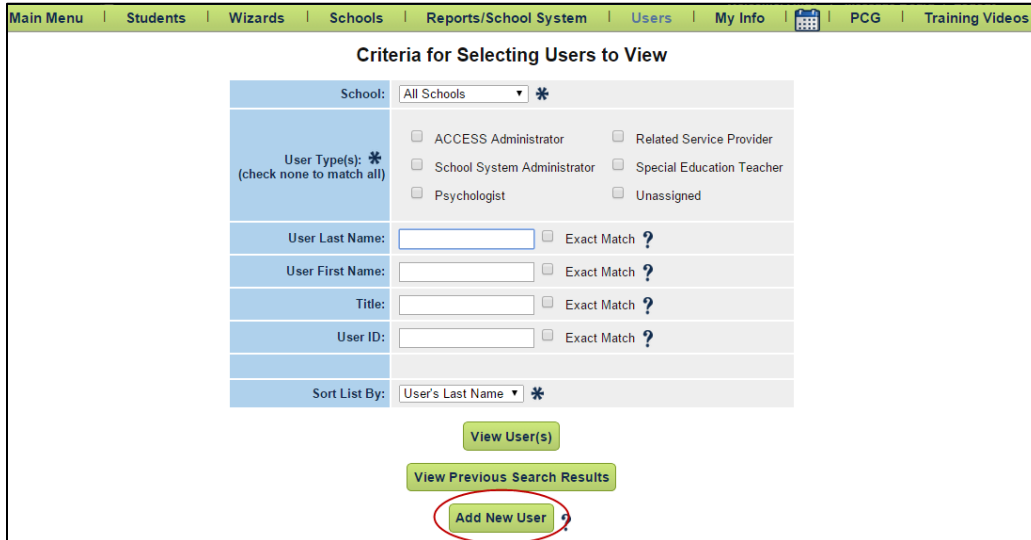
Update the Database ?
View School Changes
Delete this school from the database ?

MANAGING USERS

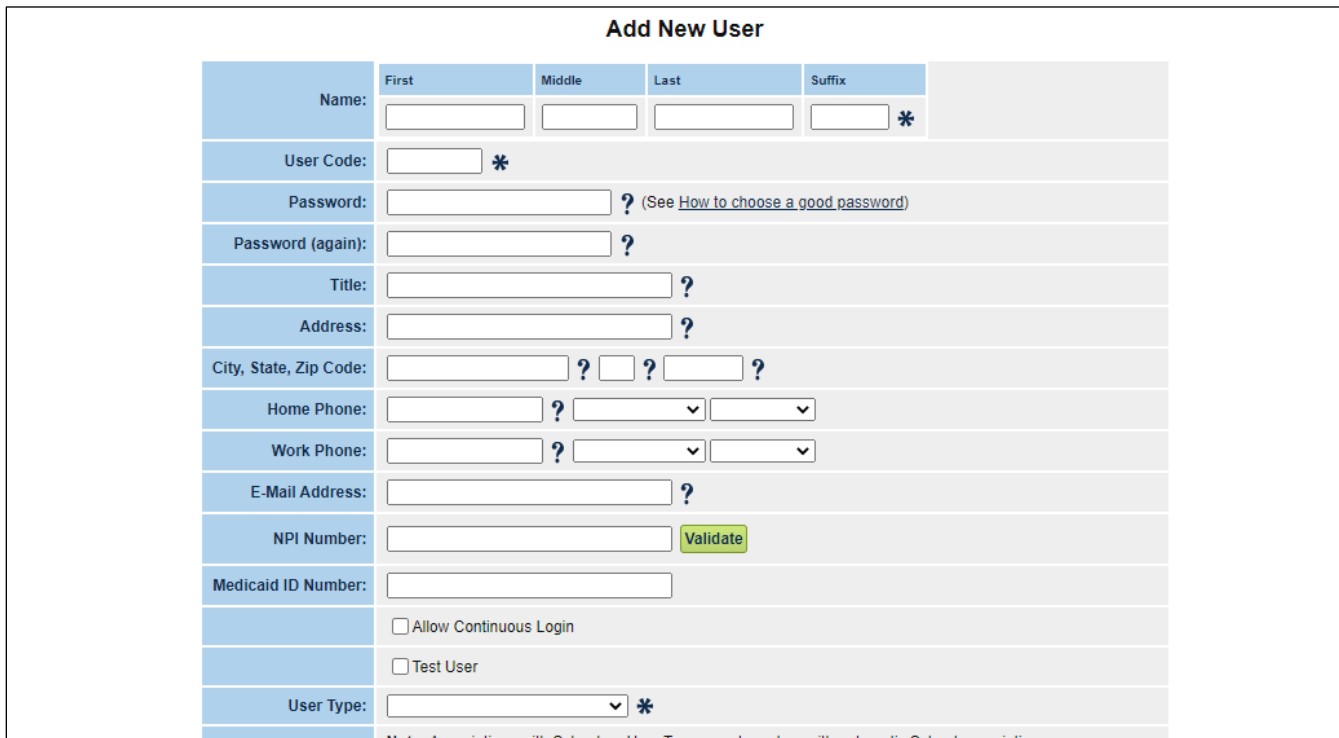
The following information discusses different ways to manage the users in your schools EasyTrac™ system.

Adding Related Service Providers to EasyTrac™

1. Select the 'Users' tab at the top of the *Navigation Bar*.
2. Select 'Add New User'.



3. Populate the required fields on the Add New User screen. Please enter AT LEAST an email address as contact information for each user. Reports CANNOT be generated in EasyTrac™ for users without an email address.



User Type

Related Service Provider - generally acceptable for all clinicians and therapists. A Related Service Provider will ONLY have access to students that have been assigned to their caseload.

Note: Users are automatically added to all school buildings in the system It is not necessary to select the schools for which they are responsible.

4. Select those Related Services that the user should have access to provide by checking the 'Can Provide' checkbox in the Related Services table (bottom of the screen).

| Related Services | | | | | | | |
|----------------------|-------------------------------------|--------------------------|--------------------|--------------------------|--------------|--------------|--------------|
| Services: | Can Provide | Approver/Supervisor | Overall Supervisor | Certified | Certified By | Begin Date | End Date |
| Audiology | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <div>▼</div> | <input type="checkbox"/> | | <div>📅</div> | <div>📅</div> |
| Audiology Evaluation | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <div>▼</div> | <input type="checkbox"/> | | <div>📅</div> | <div>📅</div> |

- a. You will ONLY select the "Approver/Supervisor" check box if the user will be approving the logs of other people. Consequently, the service logs for the user you select this for will be automatically approved upon confirmation.
 - i. When updating an existing User's profile with the 'Approver Supervisor' designation, an Effective Date will need to be identified. The Effective Date should coincide with when the Approver/Supervisor became applicable to review the users logs.

***NOTE:** If the provider whose profile is being updated has unapproved logs entered dated BEFORE the effective date, they will still require approval. If a provider whose profile is being updated has unapproved logs entered dated AFTER the effective date, selection can be made to automatically approve the logs at the time the effective date is identified.

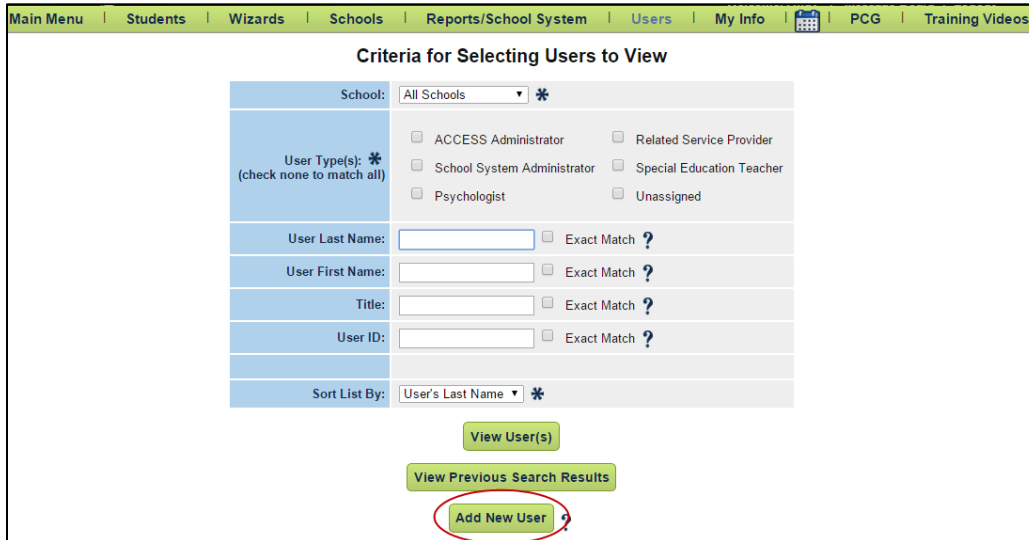
Johnny Quest has 1 Occupational Therapy logs pending approval since 01/03/2019.

☐ Approve Occupational Therapy logs provided on or after the Effective Date.

- b. If you do not identify the user as an Approver/Supervisor, select an "Overall Supervisor" from the drop-down box. This identifies the user that will electronically approve this provider's service logs.
 - c. ALL service providers MUST have certification/license information saved in the system. Select the 'Certified' checkbox and populate the "Certified By", "Begin Date" and "End Date" fields with the entity that bestowed the license on this provider as well as the effective dates of that license/certification. **Certifications MUST have BOTH a Begin and End date to be considered a valid certification.**
5. Scroll to the bottom of the screen and select 'Add User to Database'.

Adding an Administrative User to EasyTrac™

1. Select the 'Users' tab at the top of the *Navigation Bar*.
2. Select 'Add New User'.



Main Menu | Students | Wizards | Schools | Reports/School System | **Users** | My Info | PCG | Training Videos

Criteria for Selecting Users to View

School: All Schools *

User Type(s): * (check none to match all)

☐ ACCESS Administrator ☐ Related Service Provider
☐ School System Administrator ☐ Special Education Teacher
☐ Psychologist ☐ Unassigned

User Last Name: ☐ Exact Match ?

User First Name: ☐ Exact Match ?

Title: ☐ Exact Match ?

User ID: ☐ Exact Match ?


Sort List By: User's Last Name *

[View User\(s\)](#)

[View Previous Search Results](#)

[Add New User](#)

3. Populate the required fields on the Add New User screen. The Address and Phone Number fields are not required however it is highly recommended to add the user's Email Address. Reports CANNOT be generated in EasyTrac™ for users without an email address.



Main Menu | Students | Wizards | Schools | Reports/School System | **Users** | My Info | My Calendar | PCG | Training Videos

Add New User

Name: First Middle Last Suffix *

User Code: *

Password: ? (See How to choose a good password)

Password (again): ?

Title: ?

Address: ?

City, State, Zip Code: ? ? ?

Home Phone: ?

Work Phone: ?

E-Mail Address: ?

NPI Number: [Validate](#)

Medicaid ID Number:

User Type

ACCESS Administrator – GLOBAL viewing/editing rights in EasyTrac™. This user CANNOT have a caseload assigned to them as they typically serve as the Overall Supervisor for the Related Service Provider.

School System Administrator – GLOBAL viewing/editing rights in EasyTrac™. This user CAN have a caseload assigned to them. Most common for someone that administers the ACCESS program at the LEA but may ALSO log direct services for students (i.e. – Special Transportation, Psychologist, Social Worker, etc.). This user type can also serve as the Overall Supervisor for any Related Service Provider.

Note: Users are automatically added to all school buildings in the system. There is no need to select which schools the user is responsible for.

4. Select BOTH the “Can Provide” and “Approver/Supervisor” checkboxes in the Related Services table (bottom of the screen) for ALL services that your LEA provides. Checking the “Approver/Supervisor” checkbox will enable the user to be selected as the “Overall Supervisor” for that service.

| Related Services | | | | | | | |
|----------------------|-------------------------------------|-------------------------------------|----------------------|--------------------------|----------------------|----------------------|----------------------|
| Services: | Can Provide | Approver/Supervisor | Overall Supervisor | Certified | Certified By | Begin Date | End Date |
| Audiology | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Audiology Evaluation | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="text"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

5. Scroll to the bottom of the screen and select ‘Add User to Database’.
6. When updating an existing User’s profile with the ‘Approver Supervisor’ designation, an Effective Date will need to be identified. The effective date should reflect the date the individuals became able to supervise/approve logs for other users.

Please enter the effective date for the change made to this provider's requirement for supervision/approval for **Audiology Evaluation**:

Change Effective Date:

Editing Supervisor Designations in EasyTrac™

1. Select the 'Users' tab at the top of the *Navigation Bar*.
2. Search for the user.
3. Select the user's name.
4. Scroll down to the Service Certifications table.

| | | | | | |
|------------------------------------|-------------------------------------|--------------------------|---------------------------|-----|-------------|
| Speech/Language/Hearing | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Manage Supervisors | No | View |
| Speech/Language/Hearing Evaluation | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Manage Supervisors | Yes | View |

5. Select the "Manage Supervisors" button.
6. Remove or change the "Overall Supervisor" selection.

Manage Supervisors
Agatha Barkely (Speech/Language/Hearing)

Overall Supervisor: Joe Admin

School
 test middle school
 Test Outplacement

Joe Admin
 Joe Admin
 Andy Martin

Update the Database ?

7. Select the "Update the Database" button.

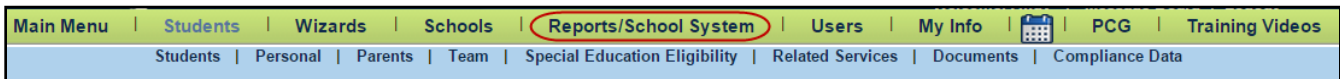
Inactivating Users in EasyTrac™

Prior to inactivating a Related Service Provider, remove the “Overall Supervisor” selection for that provider. Otherwise, the inactive provider will remain on the designated supervisor’s Log Approval list.

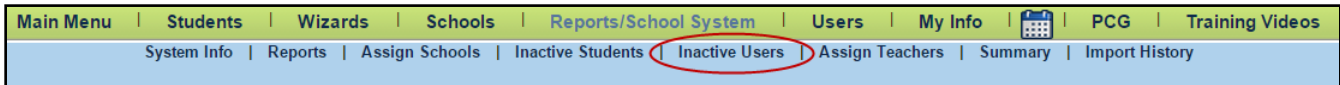
1. Select the ‘Users’ tab at the top of the *Home Screen*.
2. Search for the user.
3. Select the “Del” checkbox to the left of the user’s name.
4. Select the “Yes, I’m Sure” button.

Reactivating Users in EasyTrac™

1. Select the “Reports/School System” tab at the top of the screen.



2. Select the “Inactive Users” tab.



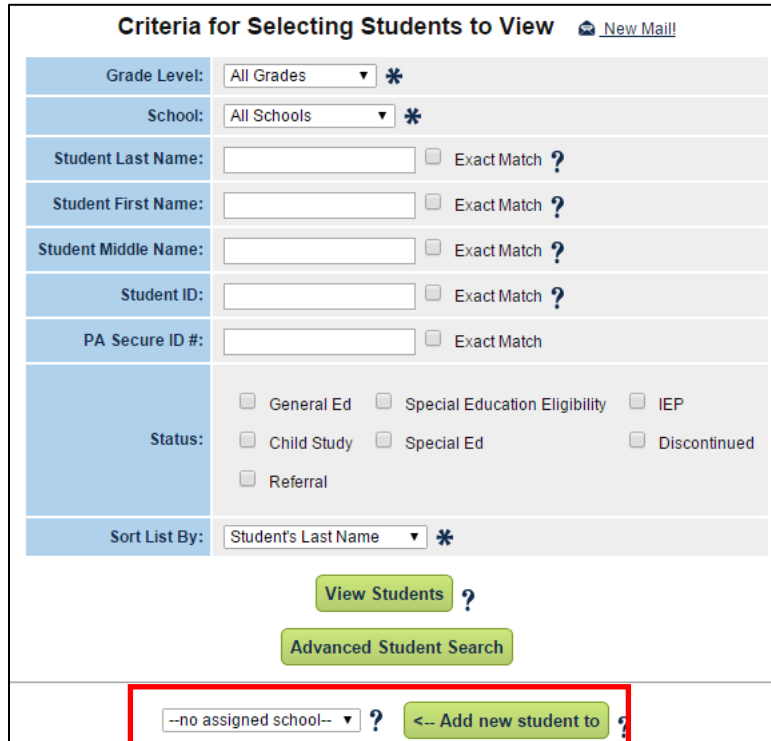
3. Search for the user.
4. Select the user’s name.
5. Select the “Re-Activate this User in the Database” button.

Re-Activate this User in the Database

MANAGING STUDENTS

Adding Students to EasyTrac™

1. Select 'Students' at the top of the *Navigation Bar*.
2. At the bottom of the screen, select the school from the drop-down box then select 'Add new student to'.



Criteria for Selecting Students to View [New Mail!](#)

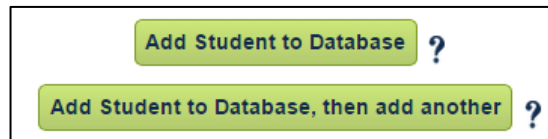
| | | |
|----------------------|--|--|
| Grade Level: | All Grades | * |
| School: | All Schools | * |
| Student Last Name: | | <input type="checkbox"/> Exact Match ? |
| Student First Name: | | <input type="checkbox"/> Exact Match ? |
| Student Middle Name: | | <input type="checkbox"/> Exact Match ? |
| Student ID: | | <input type="checkbox"/> Exact Match ? |
| PA Secure ID #: | | <input type="checkbox"/> Exact Match |
| Status: | <input type="checkbox"/> General Ed <input type="checkbox"/> Special Education Eligibility <input type="checkbox"/> IEP <input type="checkbox"/> Child Study <input type="checkbox"/> Special Ed <input type="checkbox"/> Discontinued <input type="checkbox"/> Referral | |
| Sort List By: | Student's Last Name | * |

[View Students](#) ?

[Advanced Student Search](#)

--no assigned school-- ? [<-- Add new student to](#) ?

3. Enter the required student information, notated with a blue asterisk next to each field.
 - a. Please confirm that the First Name, Last Name, Date of Birth and Gender are accurate to what is listed in PROMISE, as these fields are used in the monthly Medicaid Eligibility match.
 - b. The StudentID field is the main student identifier in EasyTrac™. It is RECOMMENDED that the StudentID and PASecureID fields match for consistency purposes.
4. Select either the "Add Student to Database" or "Add Student to Database, then add another" button.



[Add Student to Database](#) ?

[Add Student to Database, then add another](#) ?

- a. If the error message "Possible Duplicate Students Found", navigate to the inactive students page by selecting Reports/School System, select Inactive Students, search by Last Name/Student Code, and follow the instructions in the "Reactivating Students in EasyTrac™" to reactivate the student in question.

Adding Related Services

1. Select the 'Students' tab from the *Home Screen* navigation bar.
 - a. If you are already in the applicable student's record, select the "Related Services" tab at the top of the screen.
2. Search for the student.
3. Select a student's name.
4. Select the 'Related Services' tab at the top of the Personal Information page.
5. Select 'Add Related Services'.

Related Services
 View: Workspace ▼


Minnie Mouse

There are no Related Services for this student yet.

Add Related Services ?

6. Select the billable health-related services in the student's IEP from the dropdown list.

Add Related Services

 [New Mail!](#)

| Related Services ? | Num Sessions | Session Length | Location |
|-----------------------|---|---|------------------------|
| -none- ▼ | <input type="text"/> per day ▼ | <input type="text"/> minutes ▼ | <input type="text"/> ▼ |
| -none- ▼ | <input type="text"/> per day ▼ | <input type="text"/> minutes ▼ | <input type="text"/> ▼ |
| -none- ▼ | <input type="text"/> per day ▼ | <input type="text"/> minutes ▼ | <input type="text"/> ▼ |
| -none- ▼ | <input type="text"/> per day ▼ | <input type="text"/> minutes ▼ | <input type="text"/> ▼ |

To add more than 4 services of any one type, you must update the database, then return to this page

Update the Database ?

Note: *The Frequency, Duration and Location fields ARE NOT required however they are recommended for providers to view when documenting in the Service Logging Wizards.*

IT IS THE RESPONSIBILITY OF THE LEA TO VERIFY THAT LOGS BEING ENTERED FOLLOW THE ASSIGNED FREQUENCY/DURATION IN THE IEP AND OVERBILLING IS NOT OCCURRING.




7. Select 'Update the Database'.

Note: *If the student is to receive a service in BOTH a Group and Individual setting, 2 separate Related Service Records can be created but it is not required.*

Inactivating Students in EasyTrac™

1. Select 'Students' from the *Home Screen* navigation bar.
2. Search for the student that you wish to remove.
3. Select the student's name.
4. Scroll to the bottom of the page and select 'Make this Student Inactive'.


--- Parental Consent to bill for Medicaid Services ---

Signature Date:  Begin Date:  End Date: 


5. Complete the Exit Questionnaire with the date the student left the LEA, as well as a reason why the student left.
6. Select "Update the Database" button.

Reactivating Students in EasyTrac™


1. Select the "Reports/School System" from the navigation menu at the top of the screen.

| | | | | | | | | | |
|---|----------|---------|---------|-----------------------|-------|---------|---|-----|-----------------|
| Main Menu | Students | Wizards | Schools | Reports/School System | Users | My Info |  | PCG | Training Videos |
| Students Personal Parents Team Special Education Eligibility Related Services Documents Compliance Data | | | | | | | | | |

2. Select the "Inactive Students" tab.

| | | | | | | | | | |
|--|----------|---------|---------|-----------------------|-------|---------|---|-----|-----------------|
| Main Menu | Students | Wizards | Schools | Reports/School System | Users | My Info |  | PCG | Training Videos |
| System Info Reports Assign Schools Inactive Students Inactive Users Assign Teachers Summary Import History | | | | | | | | | |

3. Search for the student.
4. Select the student's name.
5. Select the "Re-Activate this Student in the Database" button.

Re-Activation Date: 

6. Select the "Re-Activate this Student in the Database" button again to confirm the action.

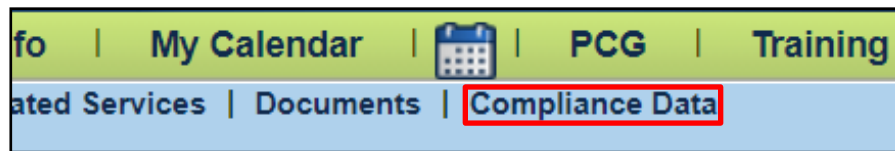
Adding Compliance Data

Compliance data is required for Medicaid School-Based Access billing. This data **MUST** be entered into the student record to process covered service logs.

Parental Consent

The Parental Consent Signature and Begin Dates are **REQUIRED** for Medicaid claiming. Services will not be submitted for reimbursement without this data added.




1. Select “Compliance Data” from the Student Menu to access the three areas for compliance data entry.



2. Select “Parental Consent” from the Compliance Data screen



3. Enter the Medicaid Consent Signature Date, Begin Date, and Consent Type in the available fields.

| Medicaid Consent Signature Date | Medicaid Consent Begin Date | Medicaid Consent End Date | Consent Type |
|--|--|--|--------------------------------|
| <input type="text"/>  | <input type="text"/>  | <input type="text"/>  | <input type="text" value="▼"/> |

Medicaid Consent Signature Date: The date the parent **SIGNED** the consent form.

Medicaid Consent Begin Date: The same date as the Medicaid Consent Signature Date, which is when the parent **SIGNED** the form. The consent begins as of the date of signature.

Medicaid Consent End Date: Should be left **BLANK**. Parental consents are considered one-time consent documents and do not require an End Date.

Consent Type: Select Yes, No, or No Response based on the type of consent given by the parent.

Note: If a parent withdraws consent to bill medical assistance, the date consent is withdrawn must be entered as a “No” consent. Medicaid billing cannot occur without parental consent. “No Response” selection is only applicable if the parent does not respond to the initial request for Parental Consent.

Medical Authorization

The “Medical Authorization Begin” and “End” date fields are REQUIRED for Medicaid claiming.

A Medical Doctor (MD) or Doctor of Osteopathy (DO) can authorize all services. **A CRNP able to authorize all services EXCEPT Personal Care Assistant (PCA) services.** If an authorization for PCA Service is added with a CRNP’s credentials, Medical Assistance will deny the claims.

A School or licensed Psychologist can provide a medical authorization for THEIR OWN SERVICES ONLY (evaluations included). A Licensed Social Worker, Licensed Professional Counselor or a Licensed Family Counselor can provide a medical authorization for THEIR OWN SERVICES ONLY.

Services will not be submitted for reimbursement without applicable data.

All Authorizations require the Authorizing Providers Name, NPI Number, and Medicaid ID number to be listed. The following parameters must be met:

- **NPI Number must be 10 digits**
- **Medicaid (MA) ID Number must be 13 digits**
- **Medicaid (MA) ID Number must be the number assigned to the Authorizing Provider as an individual, not the number assigned to their practice**
- **Numbers must be currently valid**

1. Select “Medical Authorization” from the Compliance Data student menu





2. Select the Related Services that need to be authorized and select “Add Order”

| Add Medical Authorization for Selected | | Related Service | Service Dates Start/End | Group Size | Amount of Service |
|--|--|------------------------------------|-------------------------|------------|-------------------|
| <input checked="" type="checkbox"/> | | Occupational Therapy | | | minutes per day |
| <input type="checkbox"/> | | Physical Therapy | | | minutes per day |
| <input checked="" type="checkbox"/> | | Speech/Language/Hearing | | | minutes per day |
| <input checked="" type="checkbox"/> | | Speech/Language/Hearing Evaluation | | | minutes per day |

3. Enter the Medical Authorization Signature/Begin Date. **This is the date the Authorizing Provider signed the form.**
4. Enter the Medical Authorization End Date. **This is the end date of the IEP which has been authorized.**

5. Select the appropriate Authorizing Provider from the “Authorized By” drop down menu.
 - a. The authorizing providers must have been previously entered as a User in EasyTrac™ for their name to appear in this field. Their personal NPI and MA numbers must have also been entered correctly (proper number of digits) and each service they are able to authorize selected as “Can Provide” in their EasyTrac™ User profile. If you do not see the authorizing provider’s name listed, STOP and go back and add the person as a user along with their NPI/MA numbers. Be sure to check all applicable services to be authorized under “Can Provide.” Then come back to the student’s record and enter the medical authorization.

| Add a New Medical Authorization Record | | | |
|--|--|---|----------------|
| Medical Authorization Signature/Begin Date | | Medical Authorization End Date | |
| 11/15/2019  | | 11/05/2020  | |
| Authorized By: | Authorizing Provider - Occupational Therapy, Speech/Language/Hearing, Speech/Language/Hearing Evaluation ▼ | | |
| NPI: | 1234567890 | Medicaid ID: | 12345678901234 |
| <div>Add Order</div> <div>Back to Menu</div> | | | |

6. Verify the “NPI” and “Medicaid ID” fields are accurate.
 - a. If the Physician Name, NPI, or Medicaid ID are incorrect as they appear on this screen, **DO NOT ADD THE AUTHORIZATION.** Return to the User Profile and update any incorrect fields, then return to the student profile to add the Authorization correctly.
7. Select “Add Order” to add the Medical Authorization.
8. All previously entered Authorizations will be listed in the Existing Medical Authorization Records table at the top of the screen.

Special Education

The IEP Meeting Date, PA Secure ID, and Primary Disability are all required for Medicaid claiming.

1. Select “Special Education” from the Compliance Data student menu.



2. Enter the “Current IEP” date, or the IEP Meeting Date, for the IEP you wish to record and select at least the Primary Disability from the available drop-down menu and select Update.

| | | | | | |
|---|----------------------|--------------|----------------------|----------------|--------|
| PA Secure ID: | <input type="text"/> | Current IEP: | <input type="text"/> | Proj IEP Date: | -none- |
| Disabilities: | | | | | |
| Primary: | | | -none- | | |
| Secondary: | | | -none- | | |
| Third: | | | -none- | | |
| <input type="button" value="Update"/> | | | | | |
| <input type="button" value="Back to Menu"/> | | | | | |

Note: If the PA Secure ID has already been entered in the student's profile, you do not need to enter it again. It will automatically populate upon confirmation of the IEP Meeting Date.

3. Select the "Create IEP" check box to confirm the IEP Event being added to the student record.

| | | | |
|---|---------------------|-------------------|-----------------|
| Create IEP | Meeting Date | Begin Date | End Date |
| <input checked="" type="checkbox"/> | 11/06/2019 | 11/06/2019 | 11/05/2020 |
| <input type="button" value="Back"/> <input type="button" value="Update"/> | | | |

4. Verify the Meeting Date, Begin Date, and End Date of the IEP and adjust in the available boxes.
5. Select "Update" to add the IEP Event and populate the data on the page.
 - a. EasyTrac™ will allow you to select the Update button without checking the box mentioned in step 3. Make sure to select the "Create IEP" check box, otherwise the date will NOT save.

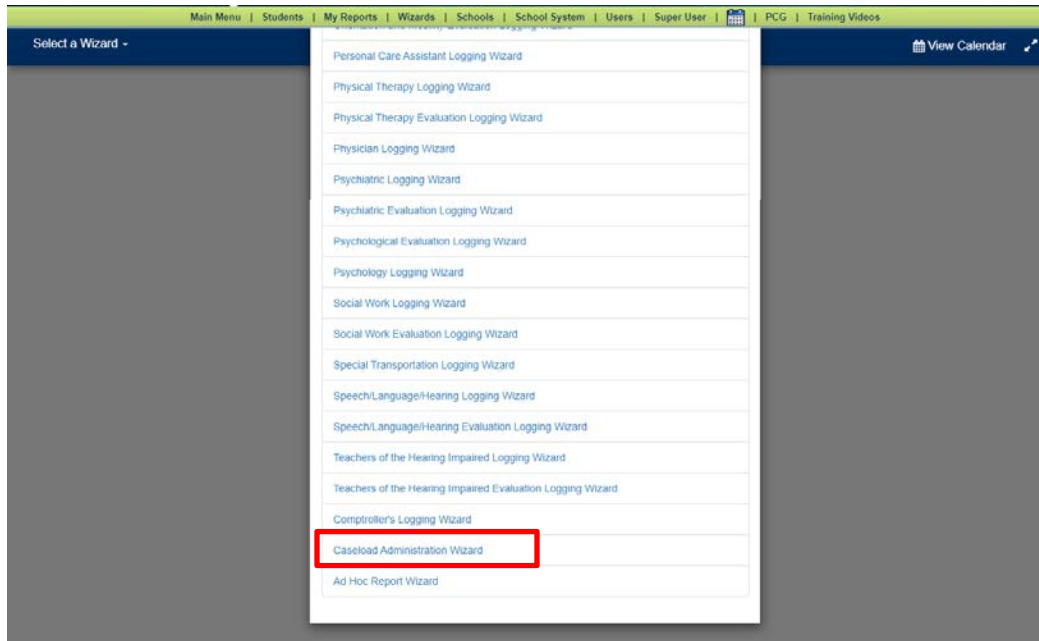
| | | | | | |
|----------------------|------------|--------------|-------------------------|----------------|------------|
| PA Secure ID: | 1234567890 | Current IEP: | 11/06/2019 | Proj IEP Date: | 11/05/2020 |
| Disabilities: | | | | | |
| Primary: | | | Intellectual Disability | | |
| Secondary: | | | -none- | | |
| Third: | | | -none- | | |

Note: The "Current IEP" field is designed to show the MOST RECENT IEP Meeting. If you are trying to enter an IEP date that has a start date prior to the current IEP, it will not appear in the above box. However, it will update the student history with a new IEP Event. Select "Student History" from the Student Menu to view all entered IEP dates in the students record.

MANAGING CASELOADS

Add Students to a Provider's Caseload

1. Select the "Wizards" tab from the *Navigation Bar*.
2. Select "Caseload Administration Wizard" .



3. Search for the provider under users for whom you would like to manage.
4. Select the user's name.
5. To add students, select the "Add More Students to Caseload" button.
 - a. Search for the student(s) you would like to add to the user's caseload.
6. Select View Students.

Caseload Administration Wizard - Search for Students to Add to Caseload of
Agatha Barkely

| | | |
|--|--|--|
| Grade Level: | All Grades ▼ * | |
| School: | All Schools ▼ * | |
| Student Last Name: | A | <input type="checkbox"/> Exact Match ? |
| Student First Name: | | <input type="checkbox"/> Exact Match ? |
| Student Middle Name: | | <input type="checkbox"/> Exact Match ? |
| Student ID: | | <input type="checkbox"/> Exact Match ? |
| PA Secure ID #: | | <input type="checkbox"/> Exact Match |
| Status: | <input type="checkbox"/> General Ed <input type="checkbox"/> Special Education Eligibility <input type="checkbox"/> IEP <input type="checkbox"/> Child Study <input type="checkbox"/> Special Ed <input type="checkbox"/> Discontinued <input type="checkbox"/> Referral | |
| | | |
| | | |
| | | |
| | | |
| Sort List By: | Student's Last Name ▼ * | |
| <div style="border: 1px solid red; border-radius: 50%; padding: 5px; display: inline-block;">View Students ?</div> | | |

7. Check the 'Team Member' check box to the left of the student(s) you would like to add to the provider's caseload.
8. If the type of service that the user provides has not been added to the student's Related Service table, it can be added by selecting the checkbox for the service on the right side of the screen (i.e. Speech, OT, etc.).

Caseload Administration Wizard - Select students to add to caseload of Agatha Barkely

To add a student to your caseload, select EITHER the Case Manager OR Team Member check box. You should never select both. If the check box next to the related service is checked, then the service will be added to the student's Related Services Page if it does not already exist.

| Case Manager | Team Member | Student | School | Grade | DOB | Case Manager | Services |
|--------------|--|-----------------|--------|-------|------------|--------------|---|
| | <input type="checkbox"/> Check All <input type="checkbox"/> Check None | | | | | | |
| | <input checked="" type="checkbox"/> | Wednesday Adams | TMS | 9 | 10/31/2005 | | <input checked="" type="checkbox"/> Speech/Language/Hearing (Related Services) <input checked="" type="checkbox"/> Speech/Language/Hearing Evaluation (Related Services) |
| | <input checked="" type="checkbox"/> | Allan Axon | TMS | | 07/20/1997 | | <input checked="" type="checkbox"/> Speech/Language/Hearing (Related Services) <input checked="" type="checkbox"/> Speech/Language/Hearing Evaluation (Related Services) |

9. Select 'Add Students to Caseload'.

****Note: The student must be assigned to a school to be assigned to a caseload. If a student does not appear in the search results, you must review the students profile to select a school.**

Remove Students from a Provider's Caseload

1. Follow steps 1-4 above.
2. Uncheck the "Team Member" checkbox to the left of the student(s) you would like to remove
3. Select the 'Update the Database' button – this will remove all the students you selected
4. Confirm the removal of the students.
 - a. Before removing a student from a user's caseload, be sure the user has completed all service documentation.

Confirm Removing Students from Caseload

Do you, _____ confirm that you wish to remove the following Students from _____ Caseload?

Yes, Remove Students from Caseload

No, Do Not Remove Students

Transfer or Copy a Caseload

1. Follow steps 1-4 under Add Students to a Provider's Caseload.
2. Select the "Transfer / Copy Caseload to Another User" button.
 - a. Select "Transfer" from the drop-down field on the left if you want to **REMOVE** the students from the **CURRENT** user's caseload and **TRANSFER** them to the user selected from the drop-down field on the right side of the screen.
 - b. Select "Copy" if you want the **CURRENT** user's caseload to be **COPIED** to the user selected from the drop-down field on the right side of the screen.
 - c. Select the "Review Students and Continue" button to save the changes.

Transfer or Copy Agatha Barkely's Special Education Caseload to Another User

| Case Manager | Team Member | Student | School | Grade | DOB | Current Case Manager |
|--------------|-------------|--------------------|--------|-------|------------|----------------------|
| | Yes | Wednesday Adams | TMS | 9 | 10/31/2005 | |
| | Yes | Allan Axon | TMS | | 07/20/1997 | |
| | Yes | Christian Gardenia | TMS | | 10/11/1999 | |
| | Yes | Blue Ivy | TMS | | 09/27/2006 | |
| | Yes | William Kochie | TMS | | 12/15/1997 | |
| | Yes | Bodie Lingenfeltem | TMS | | 12/23/2009 | |
| | Yes | Martina McBride | TMS | | 08/01/2000 | |

When Copy is selected, only students where Agatha Barkely is not the Case Manager will be copied, as a student may not have more than one Case Manager at one time.

I want to Copy Agatha Barkely's Special Education Caseload to the following user:

Copy
 Copy
 Transfer

Donald Duck
 Henrietta Jackman
 Barbara Johnson
 Luke Skywalker
 Jane Speech
 Tommy Tutone

Review Students and Continue




“ON BEHALF OF” FUNCTION

The On Behalf Of function allows an administrator to enter service logs into EasyTrac™ for a provider.

****Note:** You must complete the *On Behalf Of Permission Agreement* found in the Document Library on the PCG SBAP website <https://paaccess.pcgus.com> and email it to sbapsupport@pcgus.com

How to Use the “On Behalf Of” Function

1. Select the ‘Users’ tab from the *Home Screen* navigation bar.
2. Search for the provider for whom you want to log services.
3. Select the “On Behalf Of” icon to the left of the user’s name.

| Select a User | | | | | | | | |
|--------------------------|---|-----------------------|----------------|-----------|----------|-------|--------------------------|----------------|
| Del | On Behalf Of | CP | Name | School(s) | Students | Title | User Type | E-mail Address |
| <input type="checkbox"/> |  | <input type="radio"/> | Agatha Barkely | -All- | 0, 7 | S/L/H | Related Service Provider | |

4. A confirmation page will display, select the “OK” button.
5. All activity will be viewed and recorded as you, but acting on behalf of the user. See below screenshot for further understanding.

</

If a service log is entered “On Behalf Of” a Related Service Provider that originated as a paper log, the original paper log must be maintained on file with the district for auditing purposes.

Electronic Signature Verification Policy

Electronic signatures for completed logs are accepted effective 7/1/2012 for all services rendered after 7/1/2012.

DHS will accept SBAP provider logs that are signed with an electronic signature provided the electronic signature meets the following requirements:

- Identifies the individual signing the document by his/her name and title;
- Ensures that the document cannot be altered after the signature has been affixed by limiting access to the code or key sequence; and
- Provides an audit trail that validates the signer's identity.

Upon request from DHS, schools must be able to provide a hard copy of the log showing either verification of the provider's PIN/password or an actual signature. A handwritten original is not required.

Schools that use electronic signatures must have written policies and procedures in effect regarding use of electronic signatures. Electronically transmitted signatures must be electronically encrypted or transmitted by other technological means designed to protect and prevent access, alteration, manipulation or use by any unauthorized person. In addition to complying with security policies and procedures, providers who use computer keys or electronic signatures should sign a statement assuring that they alone will have access to and use the key or computer password. The policies, procedures, and statements of exclusive use must be maintained and available at the school's location.

Electronic Signature Verification Policies can be created and maintained by the district, or there is a basic Electronic Signature Verification Statement document available on the PCG SBAP website's Document Library

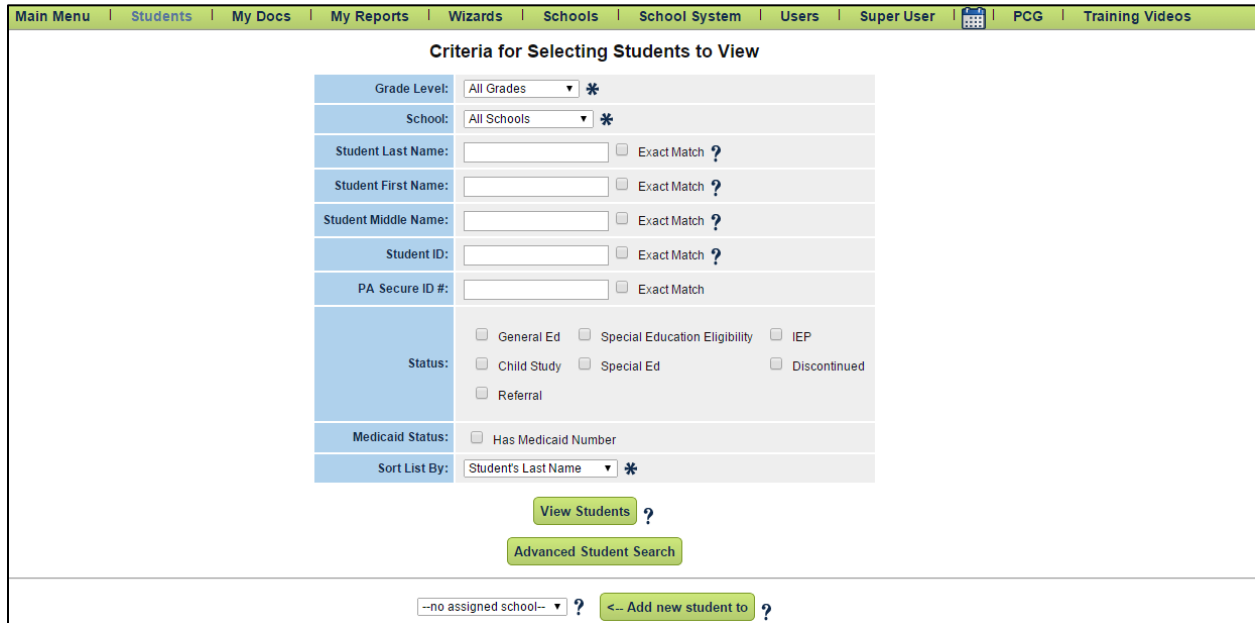
Paper Logs

DHS-approved Paper logs have been created for end users if requested. Each item on the paper log is mandatory and reflects the fields in the EasyTrac™ Service Logging Wizards for each Related Service. Providers may use paper logs to document services; however, the logs must then be entered into EasyTrac™ for processing. It may be preferred that providers enter logs directly into EasyTrac™ since it is a paperless system and doing so may better satisfy timely filing requirements rather than On Behalf Of logging.

All paper logs can be found in the document library of the PCG PA SBAP Website's Document Library.

View Service Log History Via Student Profile

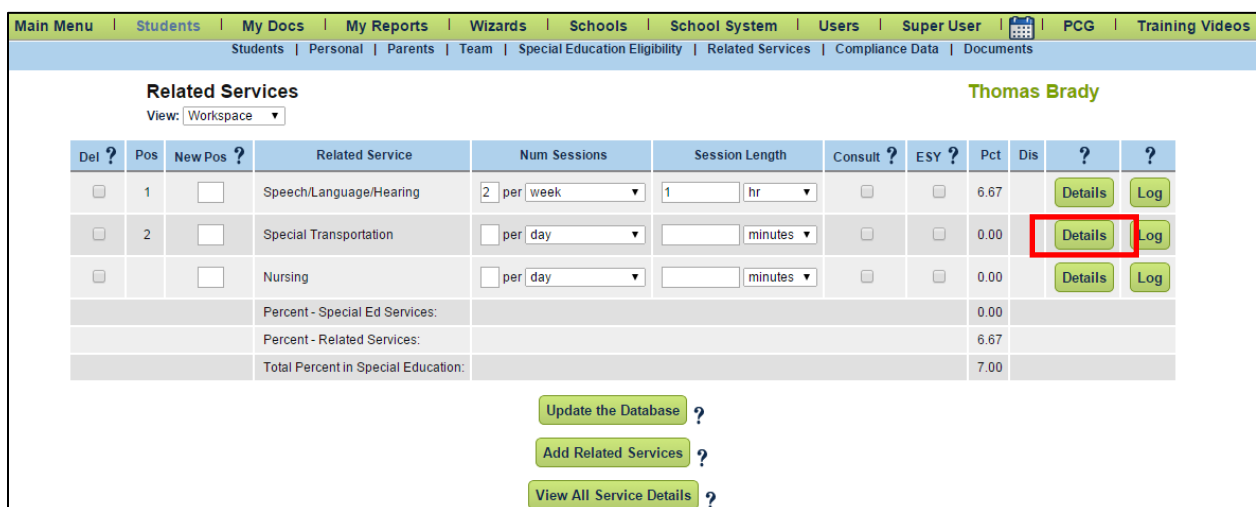
1. Search for the student by selecting on the 'Students' tab from the *Home Screen* navigation bar.



Criteria for Selecting Students to View

Grade Level: All Grades *
 School: All Schools *
 Student Last Name: Exact Match ?
 Student First Name: Exact Match ?
 Student Middle Name: Exact Match ?
 Student ID: Exact Match ?
 PA Secure ID #: Exact Match
 Status: ☐ General Ed ☐ Special Education Eligibility ☐ IEP
☐ Child Study ☐ Special Ed ☐ Discontinued
☐ Referral
 Medicaid Status: ☐ Has Medicaid Number
 Sort List By: Student's Last Name *
 View Students ?
 Advanced Student Search
 --no assigned school-- ? <-- Add new student to ?

2. Search for the student.
3. Select a student's name; this brings you to the *Personal Information* page.
4. Select the 'Related Services' tab at the top of the screen.
5. On the *Related Services Page* select the 'Details' button for the service history you want to view.



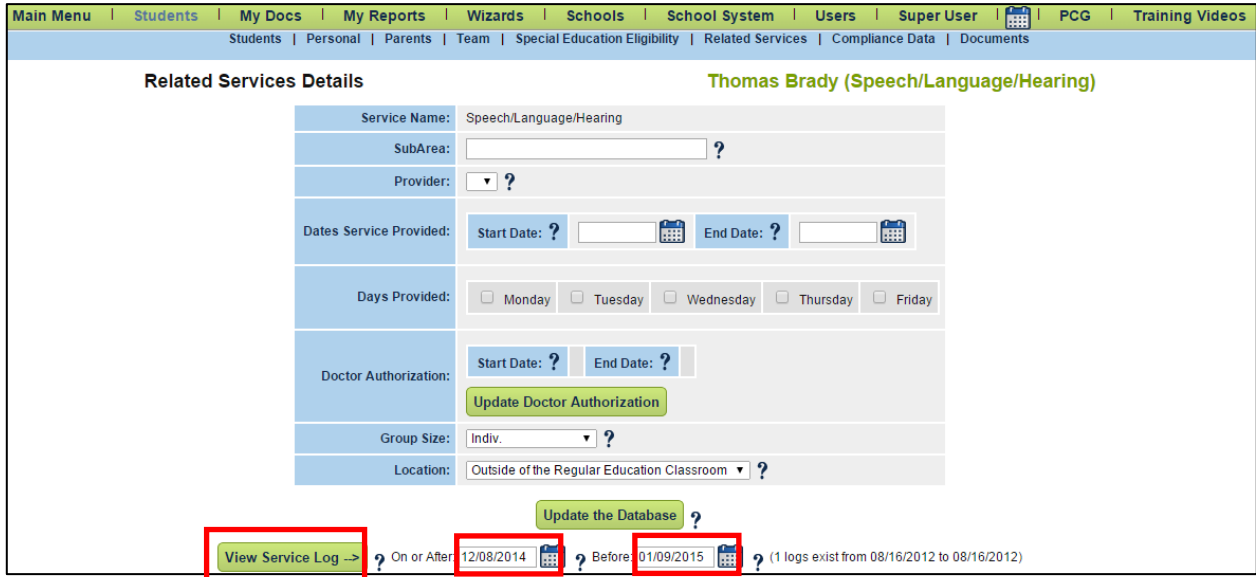
Related Services Thomas Brady
 View: Workspace

| Del ? | Pos | New Pos ? | Related Service | Num Sessions | Session Length | Consult ? | ESY ? | Pct | Dis | ? | ? |
|-------------------------------------|-----|----------------------|-------------------------|--------------|----------------|--------------------------|--------------------------|------|------|---------|-----|
| <input type="checkbox"/> | 1 | <input type="text"/> | Speech/Language/Hearing | 2 per week | 1 hr | <input type="checkbox"/> | <input type="checkbox"/> | 6.67 | | Details | Log |
| <input type="checkbox"/> | 2 | <input type="text"/> | Special Transportation | per day | minutes | <input type="checkbox"/> | <input type="checkbox"/> | 0.00 | | Details | Log |
| <input type="checkbox"/> | | <input type="text"/> | Nursing | per day | minutes | <input type="checkbox"/> | <input type="checkbox"/> | 0.00 | | Details | Log |
| Percent - Special Ed Services: | | | | | | | | | 0.00 | | |
| Percent - Related Services: | | | | | | | | | 6.67 | | |
| Total Percent in Special Education: | | | | | | | | | 7.00 | | |

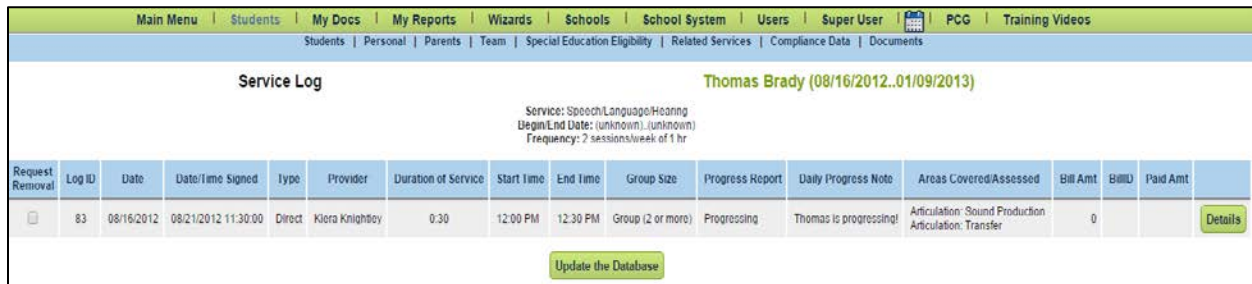
Update the Database ?
 Add Related Services ?
 View All Service Details ?

6. At the bottom of the page, complete the "On or After" and "Before" date fields to cover the service date range needed.

- Fill in the fields next to the 'On or After' or 'On or Before' dates in the text box.




- Select the 'View Service Log' button.
- After selecting on the 'View Service Log' button, the service log entry is displayed. From this page you can print the service log history or request removal of a log.



| Request Removal | Log ID | Date | Date/Time Signed | Type | Provider | Duration of Service | Start Time | End Time | Group Size | Progress Report | Daily Progress Note | Areas Covered/Assessed | Bill Amt | BILLD | Paid Amt | |
|--------------------------|--------|------------|---------------------|--------|-----------------|---------------------|------------|----------|-------------------|-----------------|------------------------|--|----------|-------|----------|---------|
| <input type="checkbox"/> | 83 | 08/16/2012 | 08/21/2012 11:30:00 | Direct | Kiera Knightley | 0:30 | 12:00 PM | 12:30 PM | Group (2 or more) | Progressing | Thomas is progressing! | Articulation: Sound Production Articulation: Transfer | 0 | | | Details |

Requesting That a Service Log Be Removed

- Follow the instructions listed in the *View Service Log History Via Student Profile* section to view your service log for a student.
- Select the box under 'Request Removal' for the log you wish to have removed.



| Request Removal | Log ID | Date | Date/Time Signed | Type | Provider | Duration of Service | Start Time | End Time | Group Size | Progress Report | Daily Progress Note | Areas Covered/Assessed | Bill Amt | BILLD | Paid Amt | |
|--------------------------|--------|------------|---------------------|--------|-----------------|---------------------|------------|----------|-------------------|-----------------|------------------------|--|----------|-------|----------|---------|
| <input type="checkbox"/> | 83 | 08/16/2012 | 08/21/2012 11:30:00 | Direct | Kiera Knightley | 0:30 | 12:00 PM | 12:30 PM | Group (2 or more) | Progressing | Thomas is progressing! | Articulation: Sound Production Articulation: Transfer | 0 | | | Details |

- Select 'Update the Database'.

4. After selecting 'Update the Database,' the following will appear.

Request Service Log Removal
Thomas Brady

| | |
|-----------------|-------------------------|
| Service: | Speech/Language/Hearing |
| Begin/End Date: | (unknown) .. (unknown) |
| Frequency: | 2 sessions/week of 1 hr |

Please confirm that you want to request that the following service log entries be removed.

| Date | Type | Provider | Duration of Service | Group Size | Progress Report | Comments |
|------------|--------|-----------------|---------------------|-------------------|-----------------|------------------------|
| 08/16/2012 | Direct | Kiera Knightley | 0:30 | Group (2 or more) | Progressing | Thomas is progressing! |

Are you sure you wish to request removal of this service log?

Why does this log need to be removed?

abc ✓

NOTE: This page only submits a *request* that a log be removed. The log will not immediately be removed from the system. To make corrections this service must be re-logged after the existing log is removed

Request Log Removal

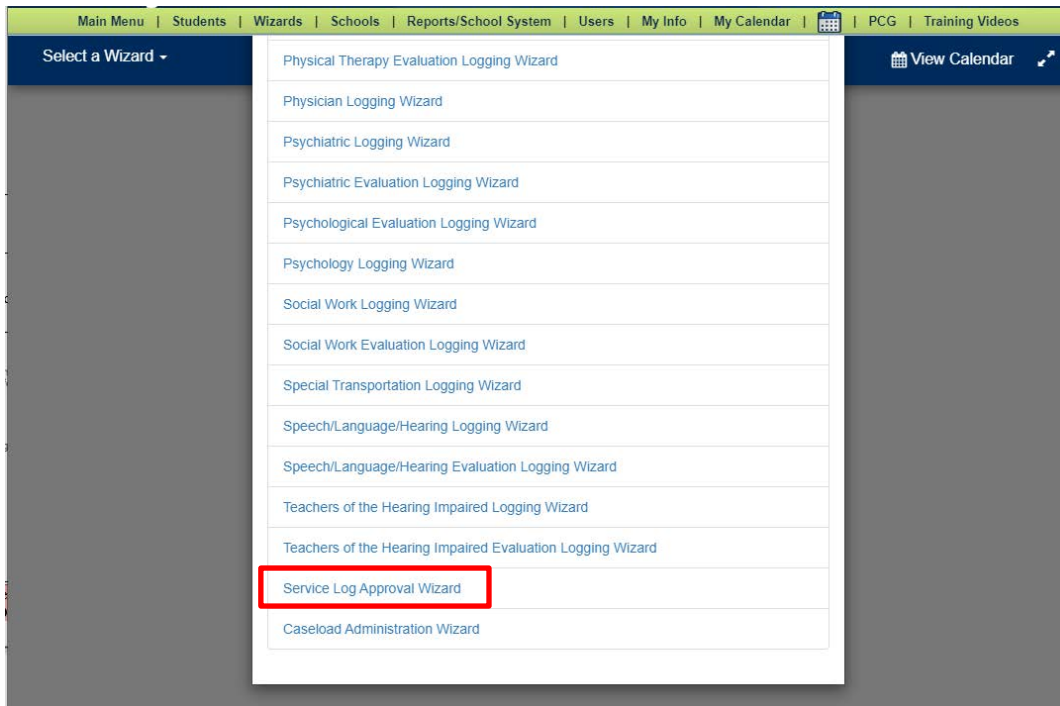
5. In the drop-down box marked “Are you sure you wish to request removal of this service log?” choose ‘Yes’ to have the log deleted.
6. Type your reasons for deleting the log in the text box and select ‘Request Log Removal’.
 - i. This reason should accurately reflect “Why” the log needs to be removed from EasyTrac for documentation purposes.
7. After a log has been requested to be removed, viewing the log will display a red X in the ‘Request Removal’ column, instead of the checkbox. This will remain until the log has been deleted.

Note: Logs that have been flagged for inactivation will be removed from the system overnight. Any logs entered incorrectly must be requested for removal by the provider or administrator and then re-entered correctly.

SERVICE LOG APPROVAL

How to Use the Service Log Approval Wizard

1. Select the 'Wizards' tab from the *Home Screen* navigation bar.
2. Select the 'Service Log Approval Wizard' link.
 - i. The "Service Log Approval Wizard" will appear if you are assigned as the Supervisor for other Users. If you are not yet assigned as a Supervisor for another User, you will not yet see this item available in your list of Wizards.



3. Select the check box for the user whose logs you wish to approve and select "Continue."

Service Log Approval Wizard

This wizard will guide you through approving service logs that were entered by the users that you are the Supervisor for. Please select the user(s) that you want to approve logs for.

Check All
Check None

☒ Agatha Barkely (Speech/Language/Hearing)
☒ Jane Speech (Speech/Language/Hearing Evaluation)

Sort Results By:

Student ▼


then

Date of Service ▼

Continue

Display Logs I Approved

4. The Approval Wizard provides a view of the log elements under the Details column. Select the plus sign to see the service times and areas covered/assessed as well as any comments.

Main Menu | Students | Wizards | Schools | Reports/School System | Users | My Info | My Calendar |  | PCG | Training Videos

Approve/Reject Service Logs Entered by


| Approve | Reject | Rejection Reason | Details | Service | Student | Date of Service | Date Signed | Service Type | Group Size | Progress Report |
|---|---|------------------|--|--|---------|-----------------|-------------|-------------------------------|------------|-----------------|
| <input type="checkbox"/> Check All <input type="checkbox"/> Check None | <input type="checkbox"/> Check All <input type="checkbox"/> Check None | | <input type="checkbox"/> Expand All <input type="checkbox"/> Collapse All | Physical Therapy Evaluation | | 05/07/2013 | 05/08/2013 | Re-evaluation/Re-Assessment | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <div> <div>Areas Covered/Assessed</div> <div> Administering Tests Consultation with a medical professional Professional Responsibilities: Parent Consultation Professional Responsibilities: Teacher/Staff Consultation Report Writing </div> </div> <div> <div>Duration of Service</div> <div>8:00</div> </div> <div> <div>Comments</div> <div>evaluation took place over that past two weeks.</div> </div> | | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | Physical Therapy Evaluation | | 07/05/2013 | 08/06/2013 | Initial Evaluation/Assessment | Indiv. | |
| <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | Physical Therapy Evaluation | | 05/02/2013 | 05/08/2013 | Initial Evaluation/Assessment | | |

(3 Service Logs)

Approve/Reject the Selected Service Logs

Skip This User / Service and Continue

5. To approve the log, select the checkbox under the “Approve” column. “Check All” and “Check None” can be used as needed to select the logs ready for approval.

Main Menu | Students | Wizards | Schools | Reports/School System | Users | My Info | My Calendar |  | PCG | Training Videos

Approve/Reject Service Logs Entered by

| Approve | Reject | Rejection Reason | Details | Service | Student | Date of Service | Date Signed | Service Type | Group Size |
|--|---|------------------|--|-----------------------------|---------|-----------------|-------------|-------------------------------|------------|
| <input checked="" type="checkbox"/> Check All <input type="checkbox"/> Check None | <input type="checkbox"/> Check All <input type="checkbox"/> Check None | | <input type="checkbox"/> Expand All <input type="checkbox"/> Collapse All | Physical Therapy Evaluation | | 05/07/2013 | 05/08/2013 | Re-evaluation/Re-Assessment | |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | | <input type="checkbox"/> | Physical Therapy Evaluation | | 07/05/2013 | 08/06/2013 | Initial Evaluation/Assessment | Indiv. |
| <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | Physical Therapy Evaluation | | 05/02/2013 | 05/08/2013 | Initial Evaluation/Assessment | |

(3 Service Logs)

Approve/Reject the Selected Service Logs

Skip This User / Service and Continue

- To reject the log, select the checkbox under the “Reject” column. Rejection of a log will identify the log as non-reimbursable. A “Rejection Reason” will need to be identified for each Rejected log.

****Note: Rejecting a log is not the same as Requesting Removal and does not remove it from EasyTrac™. Logs that have been rejected will not be picked up in the claiming process but may still need to be Requested for Removal if a provider must re-enter a log correctly.**

| Approve | | Reject | Rejection Reason | Details | Service | Student | Date of Service | Date Signed | Service Type | Group Size | Progress Report |
|--------------------------|-------------------------------------|--------------------------|------------------|--------------------------|-----------|-------------------|-----------------|-------------|--------------|------------|-----------------|
| Check All | Check None | Check All | | | | | | | | | |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <div></div> | <input type="checkbox"/> | Audiology | Will Test Student | 01/07/2019 | 02/06/2019 | Direct | Indiv. | Maintaining |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | Audiology | Will Test Student | 01/08/2019 | 02/06/2019 | Direct | Indiv. | Maintaining |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | Audiology | Will Test Student | 01/11/2019 | 02/06/2019 | Direct | Indiv. | Progressing |

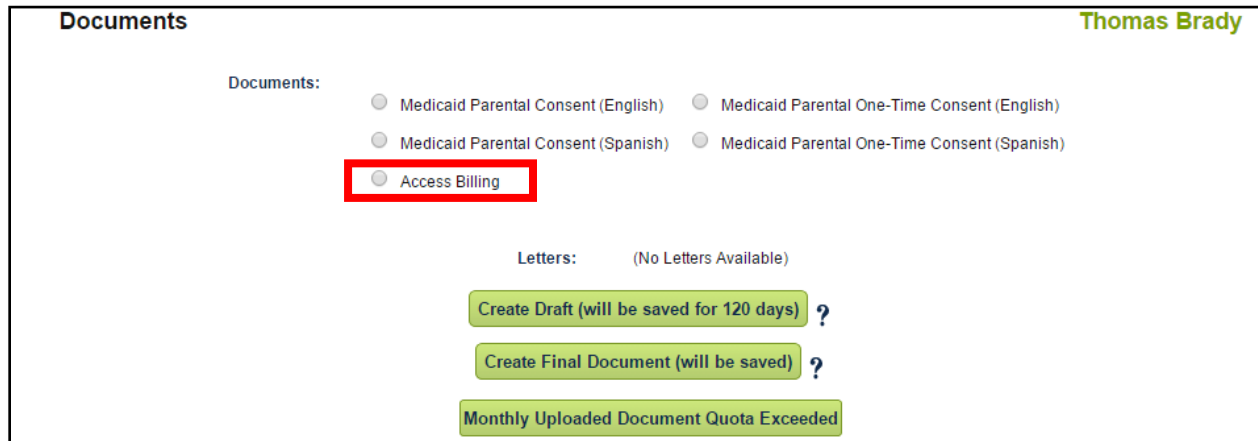
- Scroll to the bottom and select ‘Approve/Reject the Selected Service Logs’ to complete the approval/rejection process.
- The last page in the process displays the logs that were just approved. From here, you can select ‘Return to the Wizards Page’ or select the *Main Menu* button at the top of the page.

DOCUMENTS TAB IN STUDENT PROFILE

Creating the Access Billing Document

The Access Billing Document displays all services logs entered for a specific student, whether approved or not. This document can be used for attaining Supervisor Signature, providing Audit Documentation, etc.

1. Select the 'Students' tab from the *Home Screen* navigation bar.
2. Search for the student.
3. Select the student's name.
4. Select the Documents tab at the top of the *Personal Information* screen.
5. Select the radio button to the left of **Access Billing**.



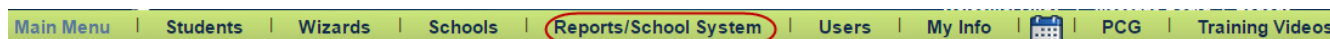
The user can complete this document in both a draft format and a final format. Drafts can be created multiple times to review the data that will appear and will display a “Proposed” watermark on the top of the page. Each draft will overwrite the previously created draft and the Final Document will overwrite the last Draft.

This printed document can be used when a supervisor signature is REQUIRED based on the Providers Certification level (COTA, PCA, etc.). The document must be printed by the user the services are documented under. As an administrator, you will need to impersonate the appropriate user to generate the document.

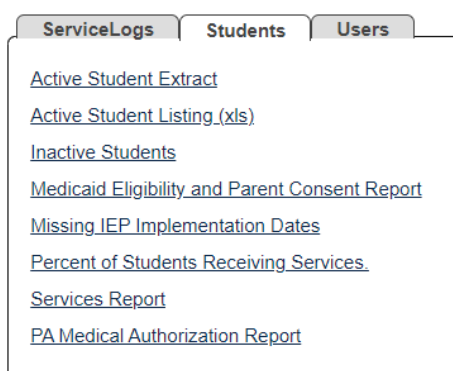
REPORTS IN EASYTRAC™

Administrators Reports in EasyTrac™

1. Select 'Reports/School System' from the Home Screen navigation bar.



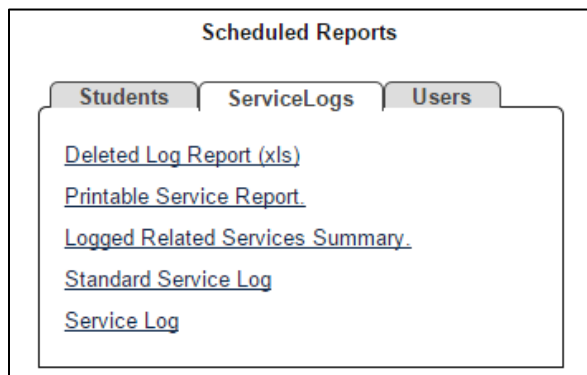
2. Reports are organized by Student, Service Logs, and Users. Select the appropriate tab for your report.



Students Tab

The report definitions are as follows:

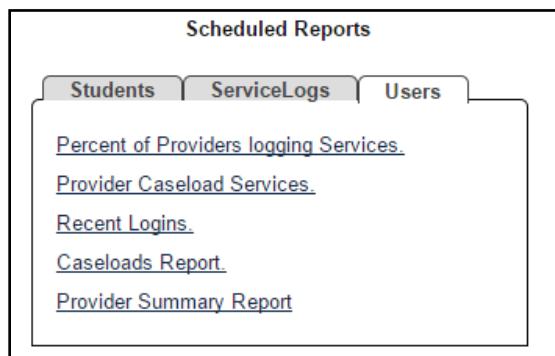
| Report | Definition |
|--|--|
| Active Student Extract | Identifies demographic information on Active Students including Primary Disability, IEP Date, PA Secure ID, and Parental Consent Date. |
| Active Student Listing | Identifies demographic information on Active Students including Primary Disability, IEP Date, PA Secure ID, and Parental Consent Date. |
| Inactive Students | Identifies basic demographic information on Inactive Students. |
| Medicaid Eligibility and Parent Consent Report | Indicates dates of Parental Consent as listed in EasyTrac and the status of Medicaid Eligibility in EasyTrac by student. |
| Missing IEP Implementation Dates | Lists students for which there is not a current IEP within the specified date range. |
| Percent of Students Receiving Services | Indicates percent of total services logged and an average of services logged per student in desired date range. |
| Services Report | Shows each Related Service listed in each students profile with all applicable details including Frequency and Duration. |
| Medical Authorization | Shows each Related Service listed in each students profile with all applicable details including Frequency and Duration. |



Service Logs Tab

The report definitions are as follows:

| Report | Definition |
|---------------------------------|--|
| Deleted Log Report | Identifies service logs that have been requested for deletion in EasyTrac. |
| Printable Service Report | Indicates each log a provider has entered for the date range identified. Must be run by the provider who documented the service. |
| Logged Related Services Summary | Breaks down provider logging by Service Type, entries logged, and hours logged. |
| Standard Service Log | Displays ALL service logs (with fixed data field options) on the database in between dates entered by the requestor |
| Service Log | Shows service logs based on parameters identified include date range, Related Service, Provider, and Student. Specific fields can be selected for return including Student Name, Provider Name, Related Service, Date/Time Signed, and Approver. |

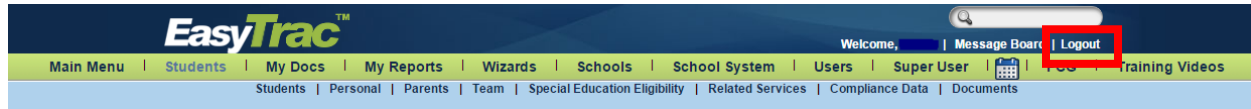


Users Tab

The report definitions are as follows:

| Report | Definition |
|---------------------------------------|---|
| Percent of Providers Logging Services | Breaks down the amount of services logged by the total amount of providers |
| Provider Caseload Services | Indicates how many service units a provider spends with a student by service type |
| Recent Logins | Shows the last time a provider logged into the EasyTrac site and how long they spent in the system. |
| Caseload Report | Indicates the services where the “Can Provide” check box is checked on the user record |
| Provider Summary Report | Identifies demographic information on Active Users, including current Certification information |

LOGGING OUT OF EASYTRAC™



1. Select “Log Out” at the left of the menu bar.
2. After you log out, close your browser

Notes:

- * *You can log out from any part of the system.*
- * *You do not have to go back to the Home Screen.*
- * *You must log out of EasyTrac™ and close your browser if you:*
 - *Step away from your computer*
 - *Finish using the system*
 - *Leave for the day*

**** Always Log Out and Exit the Browser ****

** If you do not Log Out and close your browser, anyone can access information in EasyTrac™ or record information under your login name.