



EASYTRAC™

Administrator Training

Training Date: _____

Trainer: _____

Questions & Support: Send an Email Through the
Message Board Link on Main Menu



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WHO IS PUBLIC CONSULTING GROUP (PCG)

Public Consulting Group, Inc. (PCG) is a management consulting firm committed to providing the highest level of service and quality products to state and local government clients and assisting them in endeavors to enhance revenue, reduce costs, increase operational performance, improve efficiency and streamline technology. Established in 1986, PCG focuses on targeted lines of business and on building lasting client relationships in the areas of education, government finance and health and human services.

PCG EDUCATION

PCG Education has achieved numerous successes working with School Districts, State Departments of Education and Medicaid Agencies across the nation since 1992. Working with school districts ranging in size from 200 students to 435,000 students, PCG offers full service consulting integrated with innovative and scalable technology solutions to address the changing needs of the K-12 education community.

EasyTRAC™ GENERAL INFORMATION

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.

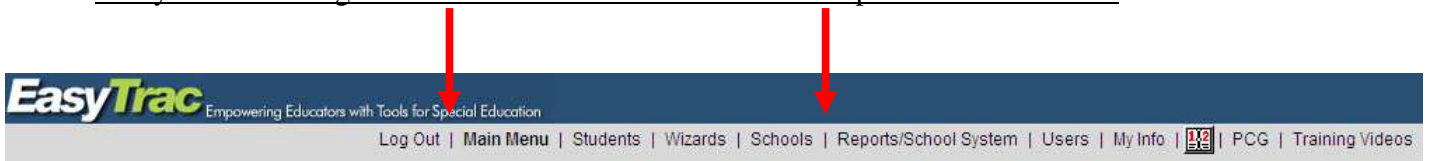
Please adhere to the following procedures to ensure security:

- **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 of EasyTrac™ and close your browser when you are finished.**

Note: EasyTRAC™ will automatically log you out of the system after a period of inactivity.

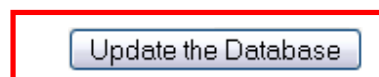
Navigation

EasyTRAC™ is menu bar driven with tabs along the top on the screen that is used to navigate through the system. Clicking different tabs takes the user to different parts of the database.










Saving Changes





After a change is made it is very important to click the 'Update the Database' button at the bottom of each screen to save the changes. 'Update the Database' is equivalent to *Save*. **Any information entered will be lost if Users forget to click 'Update the Database'.**



Important Symbols in EasyTRAC™

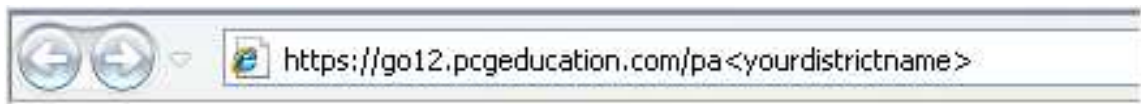
Below is a list of icons and a description of functionality for each that appears on many system pages:

	<i>Help</i> - This link shows general help information. See the End User Manual for updated, specific information.
	<i>Drop down menu</i> - Only one selection can be made. Click once on the gray box and select an option.
	<i>Check box</i> - More than one selection can be made. To add or remove a check, click once on the box.
	<i>Spell Check icon</i> – Click on the icon to launch the spell check function for a specific text box.
	<i>Calendar icon</i> – To add a date, click on the calendar and scroll through the screens to find the appropriate date.
	<i>White Check Mark</i> —Special Education eligibility date was not entered for student
	<i>Green Check Mark</i> —Nothing (IEP nor Special Education eligibility) is overdue or

	coming due
	Red Stop Sign—IEP is overdue
	Yellow Yield Sign—IEP is coming due
	Yellow Yield Sign with a “T”—Tri-Annual/Bi-Annual Eligibility Review is coming due
	Red Stop Sign with a “T”—Tri-Annual/Bi-Annual Eligibility Review is overdue

Logging Into The System

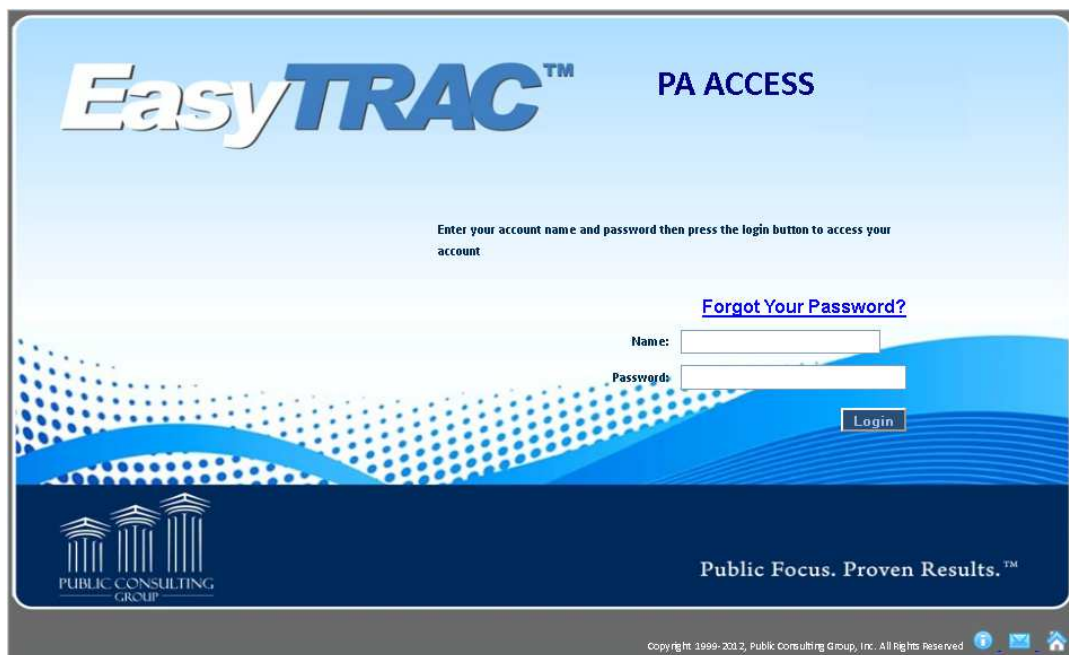
1. Open a web browser and enter your district’s URL in the address bar. We recommend that you save this to your favorites or add a short-cut link to your desk top. You will then login to the EasyTRAC™ site.



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

2. Enter your username -- (First initial <NO space> Last Name).
3. Enter your password.
4. Click the ‘Login’ button.

Note: Your username is not case sensitive. Your password is _____.



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

MAIN MENU TAB

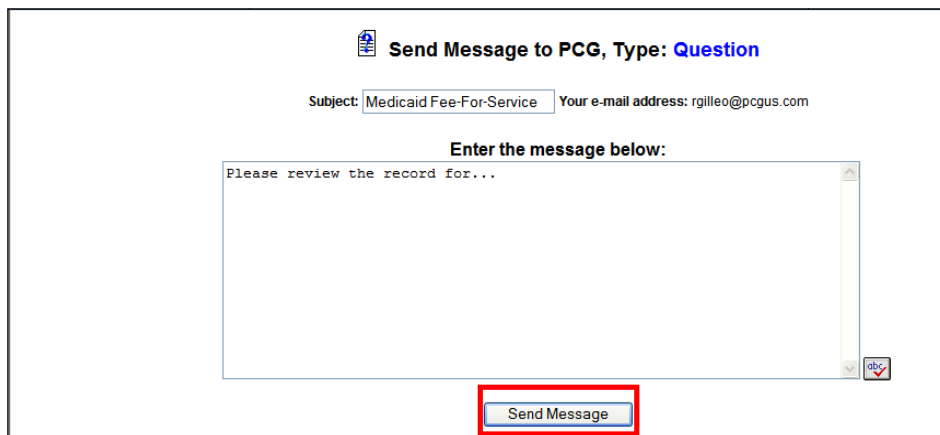
Message Board

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™ *Main Menu* page:



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



1. Click 'Send us a Message'.
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. 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. Click once on the 'Send Message' button.



Question, Comment, Suggestion: Use these links for all questions, comments, student transfer requests or suggestions. Messages will be handled as they are submitted.

Bug Report: Use this link when a feature or function of EasyTRAC™ is not working correctly.

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 in order to keep sensitive information secure. Once you have received a reply, the ['New Mail'](#) link will appear on your *Main Menu* next to the *Message Board* message options.


 **EasyTRAC™ Ver. 10.8 Message Board**  [New Mail!](#)

[Send us a Message / My Messages](#)
[Review the License Agreement](#)

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

1. Click on '[New Mail](#)'
2. Click on the '[My Messages](#)' Link

Choosing either of these links will direct users to the following screen, which displays *New Messages*, as well as stores a user's *Previous Messages*.

 **Messages for Robert Gilleo**  [New Mail!](#)

This page displays all of the messages you have sent in the EasyIEP™ system and the responses that you have received. If you have messages you have not read, a "New Messages" section will appear at the top of the page. Below any new messages, a "Previous Messages" section will display all the messages that you have previously sent or received.

New Messages

From	Site	Date	Subject	Message	Age (hr:min)
Robert Gilleo	gacobb	08/12/2007 20:06:00	RE: Medicaid Fee-For-Service	Testreply	0:01

Previous Messages

From	Site	Date	Subject	Message	To	Site	Read?	Replied?	Age (hr:min)
Robert Gilleo	gacobb	08/12/2007 20:04:00	Medicaid Fee-For-Service	Please review the record for...	Help Desk	Message Board	Yes	Yes	0:03

Once you have read all new messages, you will no longer see the '[New Mail](#)' icon on your *Main Menu* screen.

Message of the Day

Below the *Message Board* you will find the *Message of the Day*. This message is edited by your district's administrators and will alert you of any important information. Please check this message often to stay informed with district-wide changes or updates.

Files Available Online for Viewing/Printing

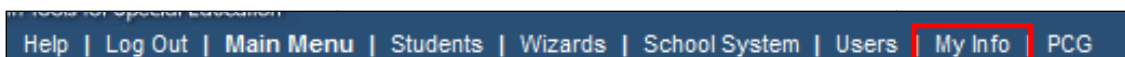
At the bottom of the *Main Menu* page you will see various files that have been made available to you for viewing or downloading. Instead of sending e-mail attachments to everyone in your district, administrators or PCG staff will often upload the necessary file to the main page of EasyTRAC™. To view a file, click on the name of the file (denoted by a [blue](#) hyperlink). The file will open and you will have the option of saving it to your computer. When you are finished viewing the file, click on 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

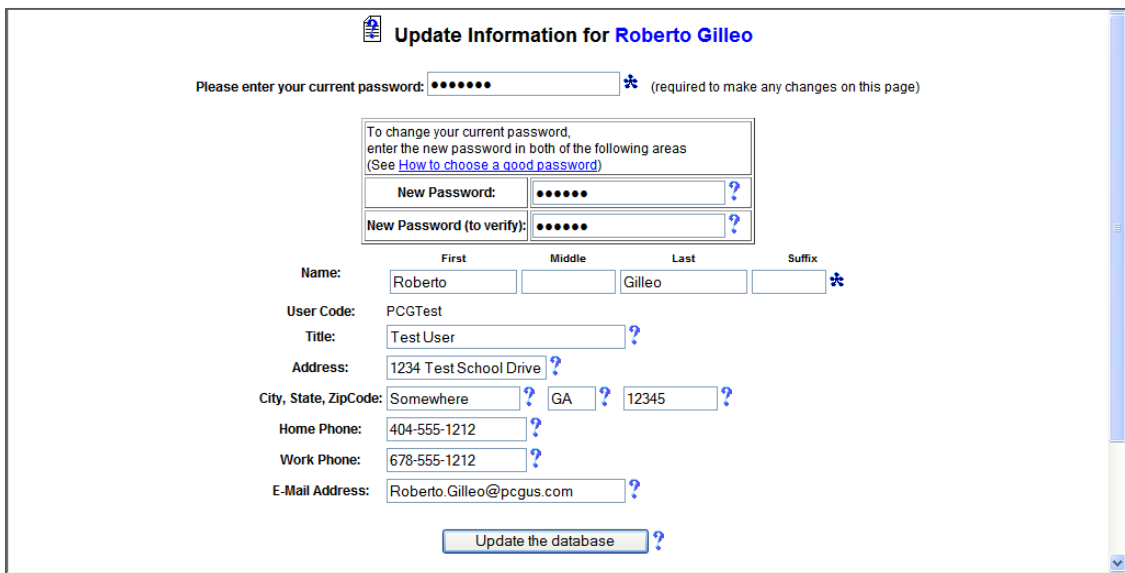
The first time you login to EasyTRAC™ you should change your password to something only you know. Please click on the [How to choose a good password](#) hyperlink if you need help.

To change your password:

1. From the *Main Menu* – Click on 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.
4. Click the ‘Update the Database’ button.



Update Information for Roberto Gilleo

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 *

User Code: PCGTest

Title: ?

Address: ?

City, State, ZipCode: ? GA ? 12345 ?

Home Phone: ?

Work Phone: ?

E-Mail Address: ?

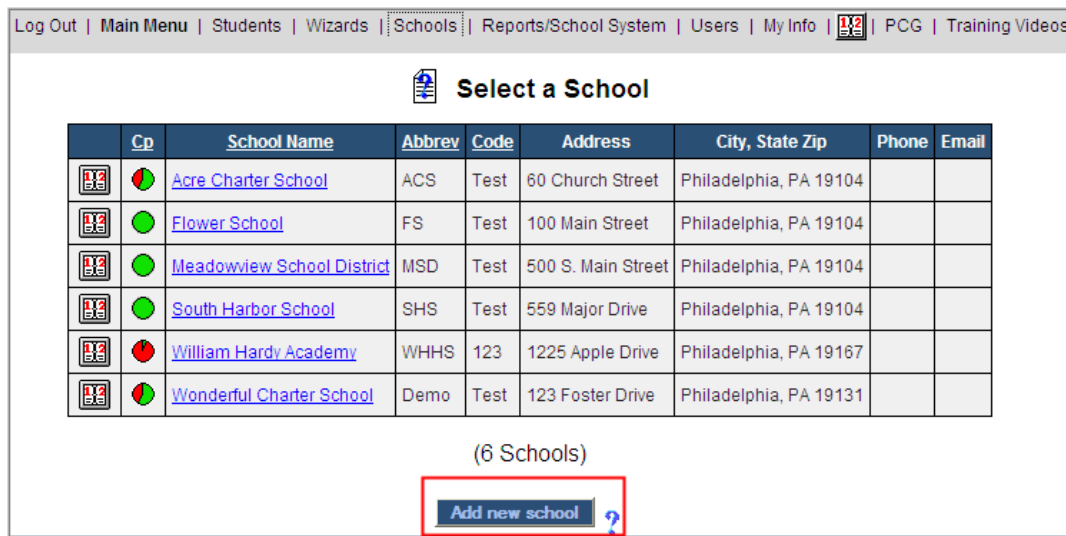
?













After updating the database, a confirmation box will display. By clicking ‘OK’ in the confirmation box, you will have successfully changed your password. The next time you log into EasyTRAC™, use your new password. District system administrators will have the ability to change your password should you forget it and/or you are unable to log in. 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.

MANAGING SCHOOLS


Adding Schools to EasyTRAC™

1. Click the 'Schools' tab at the top of the *Main Menu* screen
2. Click 'Add new school'



	Cd	School Name	Abbrev	Code	Address	City, State Zip	Phone	Email
		Acre Charter School	ACS	Test	60 Church Street	Philadelphia, PA 19104		
		Flower School	FS	Test	100 Main Street	Philadelphia, PA 19104		
		Meadowview School District	MSD	Test	500 S. Main Street	Philadelphia, PA 19104		
		South Harbor School	SHS	Test	559 Major Drive	Philadelphia, PA 19104		
		William Hardy Academy	WHHS	123	1225 Apple Drive	Philadelphia, PA 19167		
		Wonderful Charter School	Demo	Test	123 Foster Drive	Philadelphia, PA 19131		

(6 Schools)

[Add new school](#) 

3. Complete the required information and click 'Update the Database'

Note: All students in Early Intervention will need to be assigned to an EI specific school. As the students age-out of Early Intervention, they will need to be moved to a new school in EasyTRAC™.

Removing Schools from EasyTRAC™

1. Click on the 'Schools' tab at the top of the *Main Menu* screen
2. Click the name of the school you wish to remove
3. Click 'Delete this school from the database'

Note: All students must first be re-assigned before you may delete their school.

Edit School Information for Acre Charter School

School Name: *

Abbreviation: *

External School

School Code: ?

Type of School: *

Length of School Day: minute(s) * [Edit by Grade](#)

Address: ?

City, State, ZipCode: ? ? ?

Phone Number: ?

Fax Number: ?

E-Mail Address: ?


[Update the Database](#) ?

[Delete this school from the database](#) ?

MANAGING USERS

Adding Users to EasyTRAC™

1. Click on the 'Users' tab at the top of the *Main Menu*
2. Click 'Add New User'

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

Criteria for Selecting Users to View

School: *

User Types: *
(check none to get all user types)

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 Code: Exact Match ?

Sort List By: *

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


[View Previous Search Results](#)

[Add New User](#) ?

3. Complete the fields at the top of the page. Note that EasyTRAC™ does not require the user's address information. However, your district may choose to capture this information.

***Note:** Each user must be assigned a User Type. This is a level of permission associated with that user's role. The "Related Service Provider" user type is generally acceptable for all clinicians and therapists. A user type is required prior to a user having the ability to login to the system.*

Each user imported will be assigned automatically to the "Unassigned" user type. This must be updated prior to a user logging into the system.

 **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: ?

User Type: * *

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

4. Select those services the user should have access to provide by checking the 'Can Provide' checkbox.
 - a. ALL service providers MUST have certification/license information saved in the system. Click the 'Certified' checkbox and also populate the certification information.
 - b. **It is important NOT to select 'Approver/Supervisor' unless this user should have the ability to APPROVE this type of service.** Generally, only ACCESS Coordinators or Special Education Admins should have the 'Approver/Supervisor' check box checked.

***Note:** See pages 31-32 of this manual for direction on how to make a user/administrator an approver in the system.*

Related Services							
Services:	Can Provide	Approver/Supervisor	Overall Supervisor	Certified	Certified By	Begin Date	End Date
Audiology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
EI Re-Evaluation/Assessment	<input type="checkbox"/>	<input type="checkbox"/>	-No Supervisor Available-	<input type="checkbox"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
EI-Audiology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>

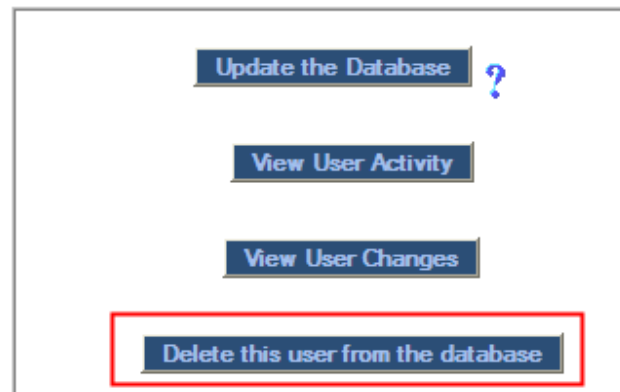
5. Scroll to the bottom of the screen and click 'Add User to Database'

Editing User Information in EasyTRAC™ (Resetting Passwords)

1. Click on the 'Users' tab at the top of the *Main Menu* screen
2. Search for the user that you wish to edit
3. Click the user's name
4. Scroll to the field you wish to edit and make the change
5. Scroll to the bottom of the screen and click 'Update the Database'

Removing Users from EasyTRAC™

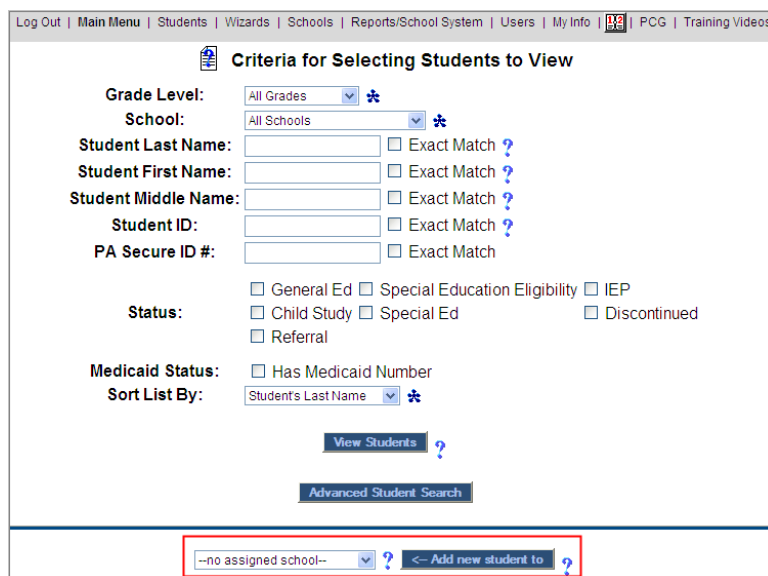
1. Click on the 'Users' tab at the top of the *Main Menu* screen
2. Search for the user that you wish to edit
3. Click the user's name
4. Scroll to the bottom of the page and click 'Delete this user from the database'



MANAGING STUDENTS

Adding Students to EasyTRAC™

1. Click on the 'Students' tab at the top of the *Main Menu* screen
2. At the bottom of the screen, select the school from the drop down box then click 'Add new student to'



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

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

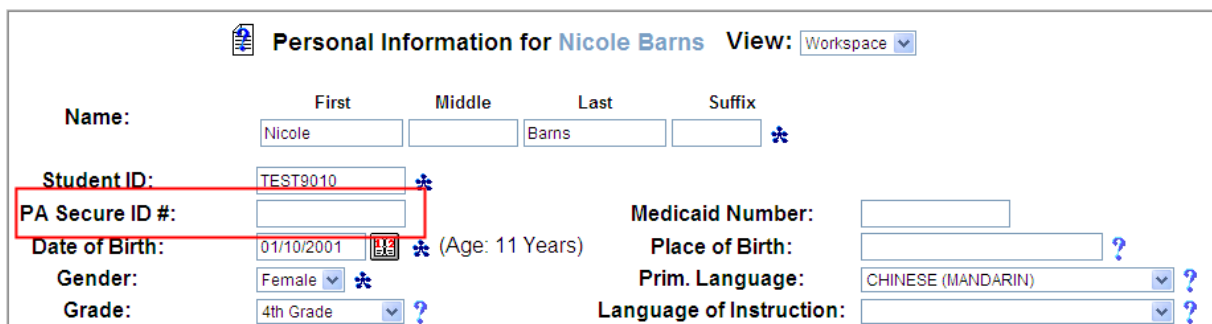
--no assigned school-- ? <-- Add new student to ?

3. Enter the student's demographic information

Populate the 'PA Secure ID #' field

Note: This is a **REQUIRED** field in Medicaid claiming. Services will not be submitted for reimbursement without this ID number in-place.

1. Click on the 'Students' tab at the top of the *Main Menu* screen
2. Search for the student
3. Click on a student's name; this brings you to the *Personal Information* page
4. Populate the PA Secure ID field.
5. Scroll to the bottom of the page, and click 'Update the Database'



Personal Information for Nicole Barns View: Workspace

Name: First: Nicole Middle: Last: Barns Suffix: *

Student ID: TEST9010 *

PA Secure ID #:




Date of Birth: 01/10/2001 (Age: 11 Years) *
 Gender: Female *
 Grade: 4th Grade *

Medicaid Number:
 Place of Birth: ?
 Prim. Language: CHINESE (MANDARIN) ?
 Language of Instruction: ?

Removing Students from EasyTRAC™

1. Click on the 'Students' tab at the top of the *Main Menu*
2. Search for the student that you wish to remove and click on their name
3. Scroll to the bottom of the page and click 'Make this student inactive' Click on the 'Students' tab at the top of the *Main Menu* screen
4. Search for the student
5. Click on a student's name; this brings you to the *Personal Information* page

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

Signature Date:  Begin Date:  End Date: 

[Update the Database](#) ?

[Make this student inactive](#) ?

PARENTAL CONSENT



Verifying Parental Consent has been obtained

The Parental Consent dates are REQUIRED for Medicaid claiming. Services will not be submitted for reimbursement without this field being populated.




1. Click on the 'Students' tab at the top of the *Main Menu* screen.
2. Search for the student


3. Click on a student's name
4. Scroll to the bottom of the page to *Parental Consent to bill for Medicaid Services*.
5. Enter the *Signature Date*, *Begin Date* and the *End Date*, this will allow for Medicaid billing for services

--- Medicaid Eligibility Dates ---


Begin Date:  End Date: 

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





Signature Date:  Begin Date:  End Date: 



Note: If a parent does not give consent for Medicaid billing during the next IEP meeting, you must enter the date the parent was notified and refused to give consent; this will prevent Medicaid billing from occurring for services after that date. This is entered in the Parental Consent to Bill for Medicaid Services confirmation screen when entering in new dates.

 Confirm Events for Felicity Heathman

Please confirm the following new event(s) for Felicity Heathman by checking the appropriate checkboxes. Also, fill in any missing information, and correct any incorrect information.

Medicaid Consent Signature Date:  Consent?:  Medicaid Consent Begin Date:  Medicaid Consent End Date: 

Note: There has been a lot of misinformation about Parental Consent in the last few years. Parents may need clarification and assurance that school therapy will not impact private therapy.

A blank Parental consent form in Spanish and in English can be found on the main menu page of EasyTrac™, in the documents section of EasyTrac™, and in the document library of the PA SBAP website: <http://www.publicconsultinggroup.com/client/paaccess/documents.html>.

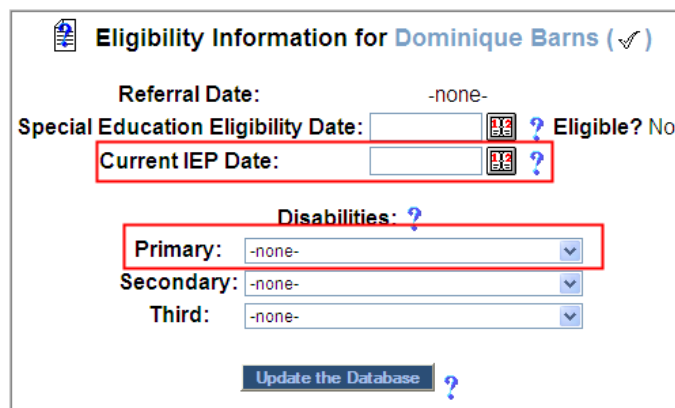
A copy of the signed Parental Consent form should be kept with the student's file; the original should be sent to your district coordinator.

Current IEP DATE

Verifying that the Current IEP Date has been entered

The Current IEP date is *REQUIRED* for Medicaid claiming. Services will not be submitted for reimbursement without this field being populated.

1. Click on the 'Students' tab at the *Main Menu* screen
2. Search for the student
3. Click on a student's name
4. Click the 'Special Education Eligibility' tab at the top of the *Personal Information for _____* screen
5. Enter the "Primary Disability" and "Begin Date" of the current IEP.
6. Click 'Update the Database'



Eligibility Information for Dominique Barns (✓)

Referral Date: -none-

Special Education Eligibility Date: ? Eligible? No

Current IEP Date: ?

Disabilities: ?

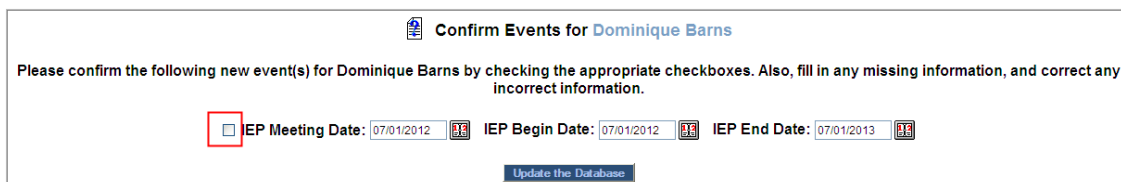
Primary: ▼

Secondary: ▼

Third: ▼

?

7. Confirm that the "IEP Meeting Date" and "End Dates" are correct by checking the box to the left of the "IEP Meeting Date"
8. Click 'Update the Database'



Confirm Events for Dominique Barns

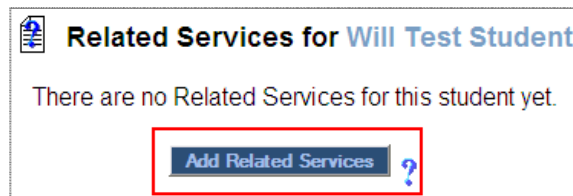
Please confirm the following new event(s) for Dominique Barns by checking the appropriate checkboxes. Also, fill in any missing information, and correct any incorrect information.

IEP Meeting Date: 07/01/2012 IEP Begin Date: 07/01/2012 IEP End Date: 07/01/2013

RELATED SERVICES

Adding Related Services

1. Click on the 'Students' tab at the top of the *Main Menu* screen
2. Search for the student
3. Click on a student's name.
4. Click the 'Related Services' tab at the top of the *Personal Information for _____* screen
5. Click 'Add Related Services'



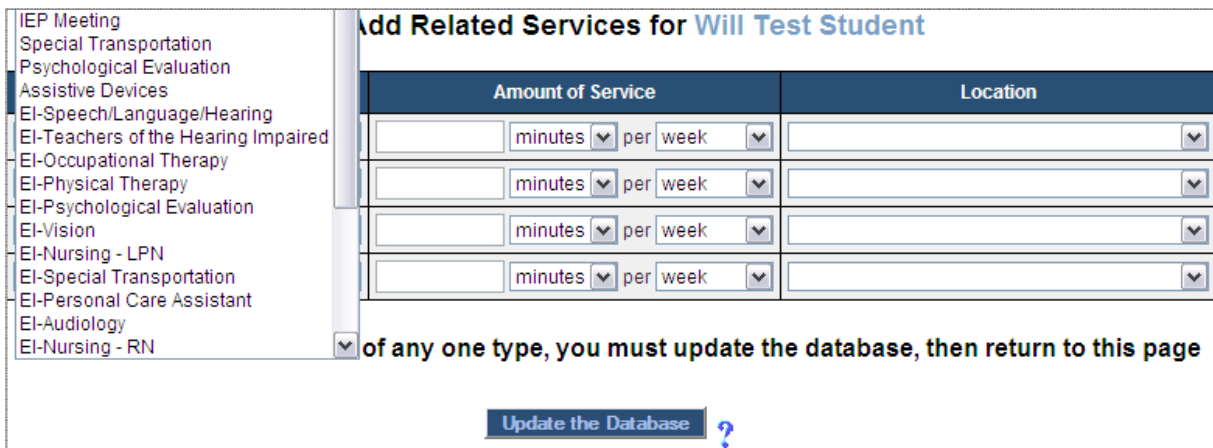
Related Services for Will Test Student

There are no Related Services for this student yet.

Add Related Services ?

6. Select the services that need to be added from the dropdown list

Note: The Frequency, Duration and Location fields ARE NOT required



Add Related Services for Will Test Student

Amount of Service	Location
<input type="text"/> minutes <input type="text"/> per week <input type="text"/>	<input type="text"/>
<input type="text"/> minutes <input type="text"/> per week <input type="text"/>	<input type="text"/>
<input type="text"/> minutes <input type="text"/> per week <input type="text"/>	<input type="text"/>
<input type="text"/> minutes <input type="text"/> per week <input type="text"/>	<input type="text"/>

of any one type, you must update the database, then return to this page

Update the Database ?

7. Click 'Update the Database'



PHYSICIAN AUTHORIZATION

*The “Doctor Authorization Begin” and “End” date fields are **REQUIRED** for Medicaid claiming. Services will not be submitted for reimbursement without these fields being populated.*

1. Click on the ‘Students’ tab at the top of the *Main Menu* screen
2. Search for the student
3. Click on a student’s name.
4. Click the ‘Related Services’ menu button
5. Click ‘Details’ for the service you wish to enter Physician Authorization dates

Del ?	Pos	New Pos ?	Related Service	Amount of Service ?	Consult ?	ESY ?	Pct	Dis ?	?	?
<input type="checkbox"/>		<input type="text"/>	Speech/Language Therapy	30 <input type="text"/> minutes <input type="text"/> per week <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	2.00		<input type="button" value="Details"/>	<input type="button" value="Log"/>
<input type="checkbox"/>		<input type="text"/>	Occupational Therapy	30 <input type="text"/> minutes <input type="text"/> per week <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	2.00		<input type="button" value="Details"/>	-----

6. Enter the Begin and End dates and then click ‘Update the Database’

 **Related Services Details for John Jones (Audiology)**  New Mail!

Service Name:

SubArea:

Provider:

Dates Service Provided: Begin: End:

Doctor Authorization: Begin: End:

Group Size:

Location:

A blank Medical Authorization form can be found on the main menu page of EasyTrac™ and in the document library of the PA SBAP website:

<http://www.publicconsultinggroup.com/client/paaccess/documents.html>.

ENTERING ADDITIONAL DOCTOR AUTHORIZATIONS

The “Doctor Authorization Begin” and “End” date fields are *REQUIRED* for Medicaid claiming. Services will not be submitted for reimbursement without these fields being populated.

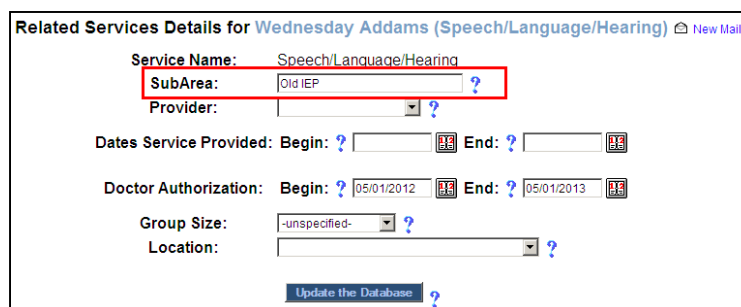
AT THIS TIME, if you **UPDATE** the “Doctor Authorization Begin” and/or “End” date fields, the previous date will be **OVERWRITTEN**. You **MUST** add an additional Related Service in order to capture an updated Doctor Authorization. In order to capture additional Doctor Authorization Begin and End dates, follow the below steps:

1. Click on the ‘Students’ tab at the top of the *Main Menu* screen
2. Search for the student
3. Click on a student’s name; this brings you to the *Personal Information* page
4. Click on the ‘Related Services’ tab at the top of the screen
5. Click on the ‘Add Related Service’
6. Select the service that needs to be added from the dropdown list
7. Click ‘Update the Database’
8. Click the ‘Details’ button of the newly entered Related Service
9. Enter the newly attained Doctor Authorization dates

Note: *This will cause the student to be listed twice (or more times) on the provider’s Logging Wizard screen. This has caused some confusion when logging services.*



In order to avoid confusion, populate the “SubArea” field in the Related Service Details screen.



MANAGING CASELOADS


Using the Caseload Administration Wizard


1. Click the 'Wizards' tab from the *Main Menu* screen
2. Click the 'Caseload Administration Wizard' link.



3. Search for the user for whom you would like to manage. For best results, first try to search by last name
4. Click on the user's name
5. To add students, search for the student (s) you would like to add to the user's caseload. For the best results, keep the search as broad as possible, usually by school.
6. Click on the 'View Students' button.

Caseload Setup Wizard - Search for students to add to caseload of Adam Clinician

Grade Level: 

School: 

Student Last Name: Exact Match

Student First Name: Exact Match


Student Middle Name: Exact Match


Student ID: Exact Match

Status: GeneralEd ChildStudy
 Referred SpecialEd

Additional Program(s):

Medicaid Status: Medicaid Eligible

Sort List By: 



7. Check the 'Team Member' check box next to the student(s) you would like to add to your 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 clicking on that service on the right side of the screen (i.e. Speech, OT, etc).
9. Click 'Add Students to Caseload'



Case Manager	Team Member		Student	School	Grade	DOB	Case Manager	Services
	Check All	Check None						
	<input type="checkbox"/>		Wednesday Addams	MES		10/31/2005		<input type="checkbox"/> Speech/Language/Hearing (Related Services) <input type="checkbox"/> Psychological Evaluation (Related Services) <input type="checkbox"/> Nursing (Related Services)
	<input type="checkbox"/>		Jessica Alba	JHS		08/02/2000		<input type="checkbox"/> Speech/Language/Hearing (Related Services) <input type="checkbox"/> Psychological Evaluation (Related Services) <input type="checkbox"/> Nursing (Related Services)



Add Students to Caseload

Add Students to Caseload, then Find More

Removing a Student from a User's Caseload

1. Uncheck the *Team Member* checkbox next to the student(s) you would like to remove
2. Click the 'Update the Database' button – this will remove all of the students you selected




“ON BEHALF OF” FUNCTION

Using the “on behalf of” function

To begin documenting services for another provider, you will need to select the “on behalf of” icon next to the user’s name for whom you want to log services.

How to Use the “On Behalf Of” Function

1. Click on the ‘Users’ tab at the top of the *Main Menu*
2. Search for the user for whom you want to log services
3. Click on the user’s name
4. Click 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"/>	Mark Smith	-All-	0, 2	Related Service Provider	Related Service Provider	SBAPsupport@pcous.com

5. A confirmation page will display, click the “I Agree” button
6. All activity will be viewed and recorded as you, but acting on behalf of the user

Note: The “On Behalf Of Permission Agreement” form needs to be filled out and returned to PCG in order to access this functionality.

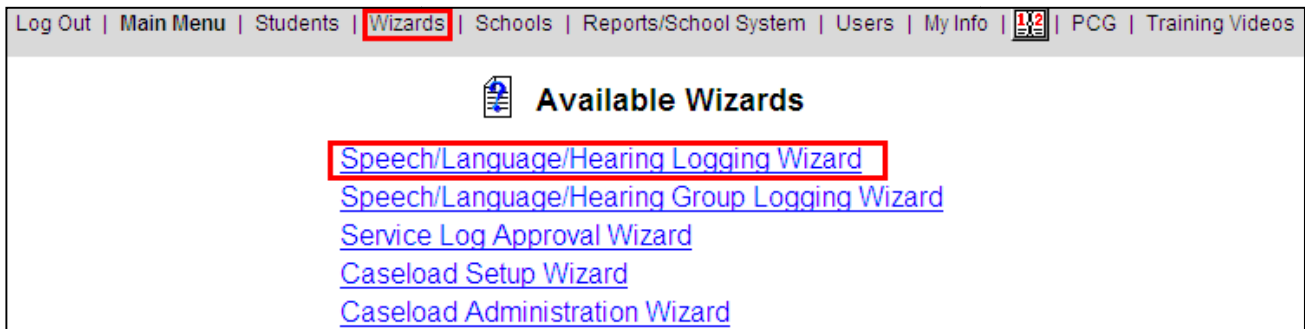
DOCUMENTING SERVICES


Using the Logging Wizard


To begin documenting services, students must be added to the provider's caseload. Once the students are added (and after you have activated the On Behalf Of functionality), you will use the Service Logging Wizard. Please see the "Managing Caseloads" section for more details.

How to Document a Service Using the Logging Wizard

1. Click on the 'Wizards' tab
2. Click the Logging Wizard for the service that you wish log




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

 **Available Wizards**

- [Speech/Language/Hearing Logging Wizard](#)
- [Speech/Language/Hearing Group Logging Wizard](#)
- [Service Log Approval Wizard](#)
- [Caseload Setup Wizard](#)
- [Caseload Administration Wizard](#)

3. Check the boxes for the students for whom you wish to document services
4. Click 'Continue.'

Note: The students listed under **Med:No** are NOT CURRENTLY eligible for MA services. The students listed under **Med:Yes** ARE CURRENTLY eligible for MA services.

 **Speech/Language/Hearing Logging Wizard (Select Students)**

This wizard will guide you through logging service delivery time for your students. Please select the students for whom you would like to log service delivery time.

Med: No

Select Saved Group:

Felicity Heathman Mark Steffan Justin Timberlake
 Lonnie Iris Tony Sullivan Rumor Willis
 Robbie Johnson Tina Thompson

(8 available students)

Med: Yes

Select Saved Group:

Jessica Alba (Med) Justin Beiber (Med) Suri Carlson (Med)
 Jennifer Apple (Med)

(4 available students)

5. Verify that you are logging a service for the correct student.

Note: The student's name is listed in **Blue** letters on the top of your Internet window.

Note: Verify the month the service is being logged for corresponds to the month in the drop down box at the top of the logging page, adjacent to the student's name.

5. On this page, select the specific Progress Report, enter Description of Service and select the appropriate Areas Covered/Assessed for each student, then click 'Update the Database'
6. Review the services for each student and at the bottom of the page, you have four options:
 - 'No, edit these log entries'
 - 'Yes, log these services'
 - 'Yes, log these services, then allow me to log another group service' OR
 - 'No, I wish to abort this entry'

Electronic Signatures

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

DPW 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;
- Provides an audit trail that validates the signer's identity.

Upon request from DPW, 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.

Paper Logs

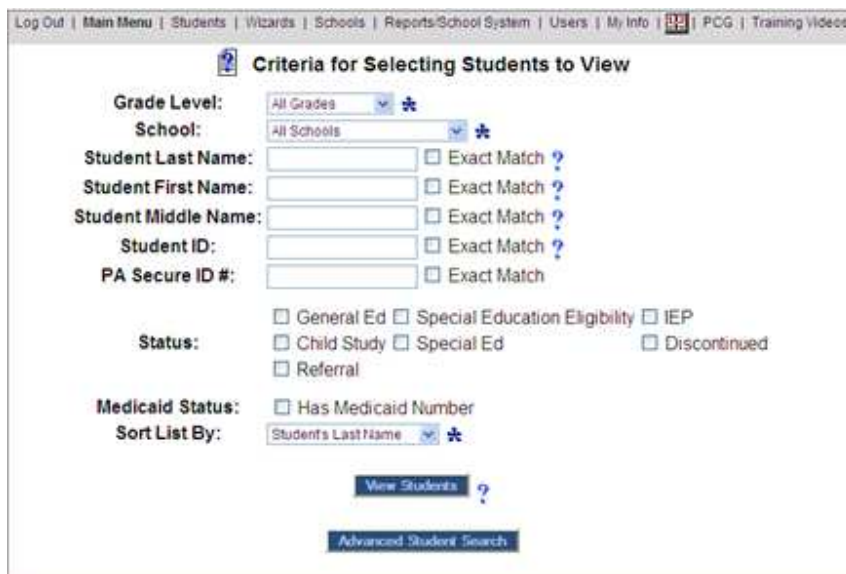
Effective July 1, 2012, providers who bill ACCESS will no longer be permitted to submit paper claims.

Paper logs that match the EasyTRAC™ logging wizards have been created for end users if requested. Each item on the paper log is mandatory. While paper logs can be completed by an end user, all finalized logs must be entered in EasyTRAC™ by that end user or the Access Coordinator/Supervisor.

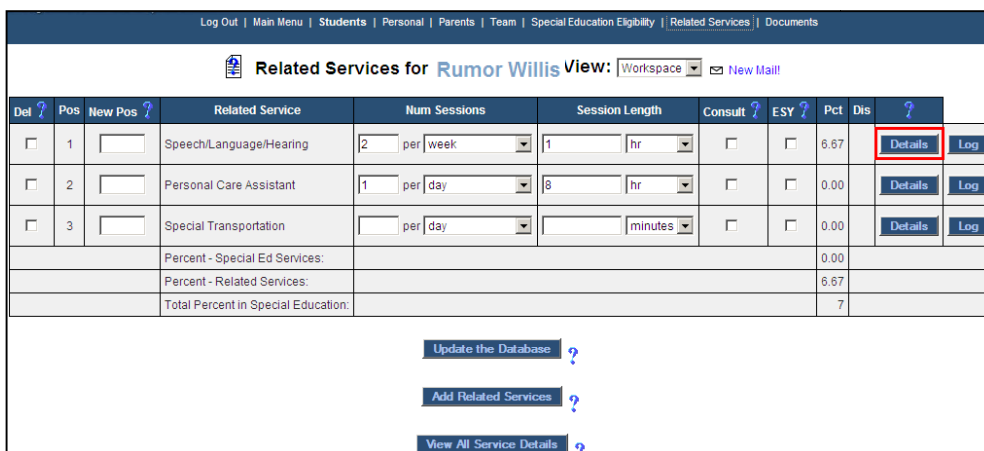
All paper logs can be found on the main menu page of EasyTRAC™ and in the document library of the PA SBAP website: <http://www.publicconsultinggroup.com/client/paaccess/documents.html>.

Printing the Service Log History

1. Search for the student by clicking on the ‘Students’ tab from the *Main Menu*



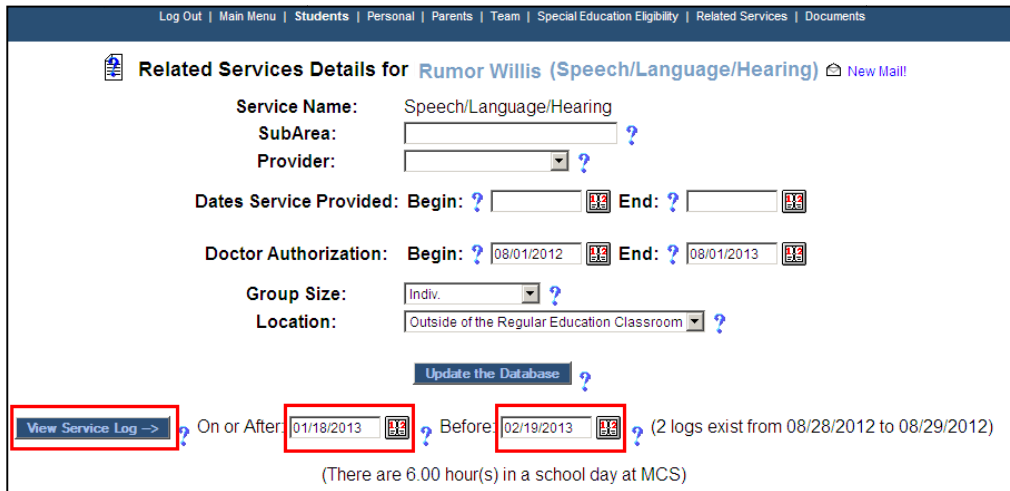
2. Search for the student
3. Click on a student’s name; this brings you to the *Personal Information* page
4. Click on the ‘Related Services’ tab at the top of the screen
5. On the *Related Services Page* click on the ‘Details’ button for the service history you want to view



Del	Pos	New Pos	Related Service	Num Sessions	Session Length	Consult	ESY	Pct	Dis	
<input type="checkbox"/>	1		Speech/Language/Hearing	2 per week	1 hr	<input type="checkbox"/>	<input type="checkbox"/>	6.67		Details Log
<input type="checkbox"/>	2		Personal Care Assistant	1 per day	8 hr	<input type="checkbox"/>	<input type="checkbox"/>	0.00		Details Log
<input type="checkbox"/>	3		Special Transportation	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	

[Update the Database](#) ?
[Add Related Services](#) ?
[View All Service Details](#) ?

6. Scroll to the bottom of the *Related Services Details* page.
7. Fill in the fields next to the 'On or After' or 'On or Before' dates in the text box
8. Click the 'View Service Log' button



Log Out | Main Menu | Students | Personal | Parents | Team | Special Education Eligibility | Related Services | Documents

Related Services Details for Rumor Willis (Speech/Language/Hearing) [New Mail!](#)

Service Name: Speech/Language/Hearing
 SubArea: ?
 Provider: ?

Dates Service Provided: Begin: ? End: ?

Doctor Authorization: Begin: 08/01/2012 ? End: 08/01/2013 ?

Group Size: Indiv. ?
 Location: Outside of the Regular Education Classroom ?

[Update the Database](#) ?

[View Service Log ->](#) ? On or After: 01/18/2013 ? Before: 02/19/2013 ? (2 logs exist from 08/28/2012 to 08/29/2012)

(There are 6.00 hour(s) in a school day at MCS)

Note: You may only view a service log for a 90 day range. (i.e. If you would like to see a service log for your entire year, you would pull up three service logs, one for each quarter.

9. After clicking on the 'View Service Log' button, the following will appear



Service Log for Rumor Willis (07/01/2012..02/19/2013) [New Mail!](#)

Service: Speech/Language/Hearing
 Begin/End Date: (unknown)..(unknown)
 Frequency:

Request Removal	Log ID	Date	Type	Provider	Duration of Service	Start Time	End Time	Group Size	Progress Report	Description of Service	Areas Covered/Assessed	
<input type="checkbox"/>	22	07/19/2012	Direct	Jennifer Aniston	0:30	02:00 PM	02:30 PM	Group (2 or more)	Maintaining	Description of service...	Phonological Awareness	Details
<input type="checkbox"/>	189	10/24/2012	Direct	Henrietta Jackman	0:45	02:00 PM	02:45 PM	Indiv.	Regressing	Rumor is regressing in loudness of voice	Voice: Loudness Voice: Pitch	Details

[Update the Database](#)

10. Select *File* from your browser tool bar
11. Select *Print Preview*
12. Select *Landscape* for the print orientation
13. Select a print size that is appropriate for you (tests have found the shrink to 80% option works best for printing)
14. Click the *Print* icon

Requesting That a Service Log Be Removed

1. Follow the instructions listed in the *To View the Services Log History* section to view your service log for a student.
2. Click the check box for 'Request Removal' for the log you wish to have removed


 **Service Log for Rumor Willis (07/01/2012..02/19/2013)** [New Mail!](#)

Service: Speech/Language/Hearing
Begin/End Date: (unknown) .. (unknown)
Frequency:

Request Removal	Log ID	Date	Type	Provider	Duration of Service	Start Time	End Time	Group Size	Progress Report	Description of Service	Areas Covered/Assessed	
<input type="checkbox"/>	22	07/19/2012	Direct	Jennifer Aniston	0:30	02:00 PM	02:30 PM	Group (2 or more)	Maintaining	Description of service...	Phonological Awareness	Details
<input type="checkbox"/>	189	10/24/2012	Direct	Henniferetta Jackman	0:45	02:00 PM	02:45 PM	Indiv.	Regressing	Rumor is regressing in loudness of voice.	Voice: Loudness Voice: Pitch	Details

[Update the Database](#)

3. Click 'Update the Database'
4. After clicking 'Update the Database,' the following will appear

 **Request Service Log Removal for Rumor Willis** [New Mail!](#)

Service: Speech/Language/Hearing
Begin/End Date: (unknown) .. (unknown)
Frequency:

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	Areas Covered/Assessed
07/19/2012	Direct	Jennifer Aniston	0:30	Group (2 or more)	Maintaining	Description of service...	Phonological Awareness

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

Why does this log need to be removed?

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 click on 'Request Log Removal'
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.

SERVICE LOG APPROVAL

Setting up the Approval Feature

1. Click the 'Users' tab from the *Main Menu*
2. Search for the user who will be the approver and click their name
3. Scroll to the *Service Certifications* section
4. Check the 'Can Provide' checkbox for each service that this user will be responsible for approving
5. Click 'Update the Database'
6. Scroll back down and check the 'Approver/Supervisor' checkbox for each service that this user will be responsible for approving
7. Click 'Update the Database'

Service Certifications					
Related Services					
Services:	Can Provide	Approver/Supervisor	Supervisor	Certified	Certifications
Audiology	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			View
EI-Audiology	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			View
EI-IEP Meeting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			View
EI-Nursing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			View
EI-Occupational Therapy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			View
EI-Orientation and Mobility	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			View

8. This user will now have an Approval Wizard on the 'Wizards' tab.

Designate users to be approved (ex., Speech Therapists, OTs, PTs)

1. Click the 'Users' tab from the *Main Menu*
2. Search for the user for whom you will be designating an approver
3. Click their name
4. Scroll to the Related Services section
5. Check the 'Can Provide' checkbox for each service that this user will be responsible providing
6. Click 'Update the Database'
7. Scroll back down and click the 'Manage Supervisors' button

Service Certifications					
Related Services					
Services:	Can Provide	Approver/Supervisor	Supervisor	Certified	Certifications
Psychological Evaluation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Manage Supervisors		View
Psychology	<input type="checkbox"/>				View
Re-Evaluation/Assessment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Manage Supervisors		View
Social Work	<input type="checkbox"/>				View
Special Transportation	<input type="checkbox"/>				View
Speech/Language/Hearing	<input type="checkbox"/>				View
Teachers of the Hearing Impaired	<input type="checkbox"/>				View

[Update the Database](#) ?

8. Select the appropriate approver in the "Overall Supervisor" field

Manage Supervisors for Terry Bradshaw (Psychological Evaluation) [New Mail!](#)

Overall Supervisor: Andy Martin

Access Charter

AGM HighSchool

Andy G Martin HighSchool

Andy George Elem School

Andy Martin Elementary School

[Update the Database](#) ?

9. Click 'Update the Database'

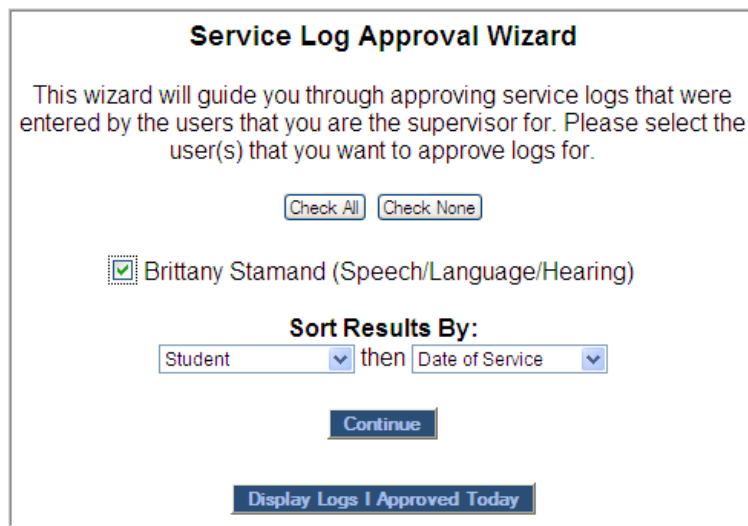
Note: You ***MAY*** select multiple approvers based on the school, but only one approver can approve any one log. Once the log is approved by one approver, it can no longer be approved by the other approver.

Using the Service Log Approval Wizard

1. Click the 'Wizards' tab from the *Main Menu*
2. Click the 'Service Log Approval Wizard' link



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



4. To approve the service, click the check box in the 'Approve' column. Alternatively, you could click 'Check All' to approve all logs.
5. Scroll to the bottom and click 'Approve the Selected Service Logs'

Approve Service Logs Entered by Brittany Stamand (Speech/Language/Hearing)

Approve	ID	Service	Student	Date of Service	Date Signed	Service Type	Duration of Service	Group Size	Progress Report	Comments	Areas Covered/Assessed
<input type="checkbox"/> <input type="button" value="Check All"/> <input type="button" value="Check None"/>	2025	Speech/Language/Hearing	Test Student 0001	07/11/2012	07/14/2012	Direct Session	0:30	Indiv.	Maintaining	Comments about progress	Voice: Pitch Voice: Quality

(1 Service Log)

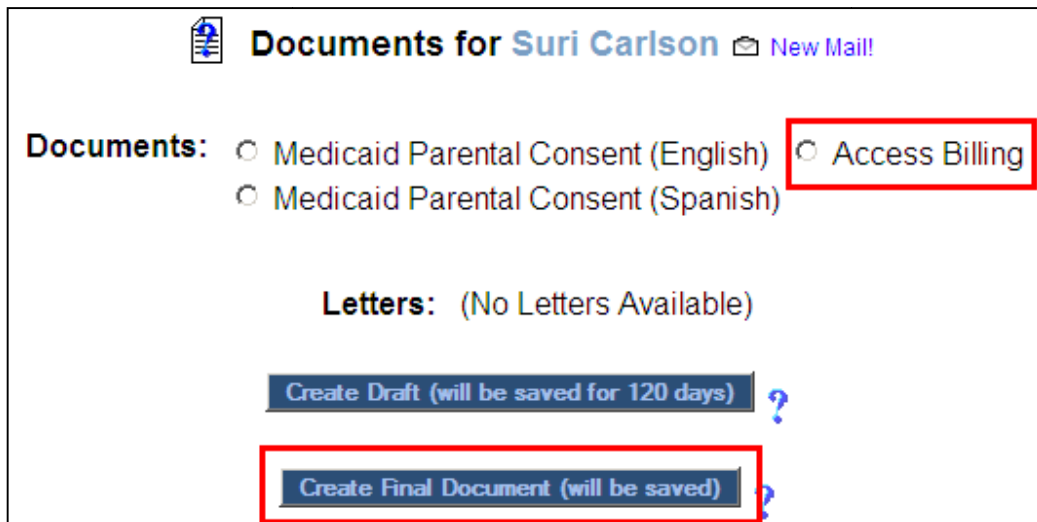
6. The last page in the process displays the logs that were just approved. From here, you can click on 'Return to the Wizards Page' or click on the *Main Menu* button at the top of the page


DOCUMENTS TAB

Users have the ability to create a document that displays all services logs entered, whether approved or not yet approved. This document can be used for any service provider that needs supervisor sign off.

Printing the Access Billing document for supervisor signature

1. Click the 'Students' tab from the *Main Menu*
2. Search for the student
3. Click the student's name
4. Click on the Documents tab at the top of the *Personal Information for _____* screen
5. Click the radio button to the left of **Access Billing**



Documents for Suri Carlson  New Mail!

Documents: Medicaid Parental Consent (English) **Access Billing**
 Medicaid Parental Consent (Spanish)

Letters: (No Letters Available)

Create Draft (will be saved for 120 days) ?

Create Final Document (will be saved) ?

6. The user can complete this document in both a draft format and a final format. The draft will display a "Proposed" watermark on the top of the page.

Note: *This printed document can be used when a supervisor signature is **REQUIRED** (COTA, PCA and certain Audiologist & Speech/Language/Hearing service logs)*




Student Name: Suri Carlson Student ID: 2304980 Date of Birth: 07/26/2012 School Address: 100 Test St Test, PA 55555				PA SecureID: 4569871 Grade: 7th Grade School Phone: (555) 555-1212								
Service Provider Thomas Brady			School Building Sample School (SAMPLE)									
Student Disability Developmental Delay (3-5 in EI Program)			Service Specialty Personal Care Assistant									
Professional Service Log				Progress Indicator				Service Time/Type				
Date	Dir	Coll	Activities/Procedures	Prog	Main	Mast	Inc	Reg	TimeIn - TimeOut	H:M	Ind	Grp
12/13/2012	X		<ul style="list-style-type: none"> • Accompanying students on school buses or other vehicles. A PCA's presence is necessary because of a student's physical disability or mental health disability. 		X				03:15 PM - 03:25 PM	0:10	X	
Apprvd												
Comments: Assist to school bus and help up the steps due to physical needs.												
SIGNATURES												
Provider Signature: _____						Title: _____			Date: _____			
Supervisors Signature:* _____						Title: _____			Date: _____			
<i>*Supervisory signature is required when services are provided by paraprofessionals</i>												


REPORTS IN EasyTRAC™

Administrators have access to several reports in EasyTrac™

1. Click 'Reports/School System' from the *Main Menu*

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

2. Select the report you wish to create

 **Reports**

Drill-Down Reports

Student Reports	User Reports
(None Available)	(None Available)
Service Reports	Service Log Reports
(None Available)	Service Documentation Review

Scheduled Reports

Active Student Listing (PDF) Active Student Listing (xls) Active Student Listing (txt) Projected IEP Meetings (PDF) Projected Eligibility Meetings (PDF) Projected IEP Meetings (txt) Projected Eligibility Meetings (txt) Service Log (xls) Deleted Log Report (xls) Deleted Log Report Missing Monthly Summary Admin Report (xls) User Infomation (xls) Percent of Students Receiving Services Percent of Providers logging Services	Provider Caseload Services Printable Service Report UsageReport (txt) Hours Logged per User Recent Logins Caseloads Report Logged Related Services Summary Parental Consent to Bill Medicaid Provider Caseload Report Medicaid Eligibility and Parent Consent Report Services Report (txt) Services Report (PDF) Active Student Extract
---	---

➤ **Service Log Report (xls)** – This report can be generated to show various details of service logs that have already been entered into EasyTrac, such as:

- **Approved and Unapproved logs**
- **Total Time of any related service (to ensure that a student is not receiving more than what is stated in the IEP)**
- **Determining which students received services on which day in order to log Special Transportation**

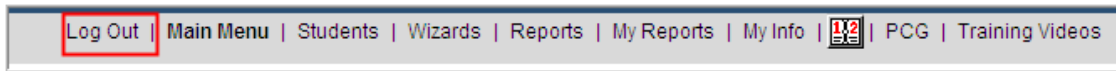
➤ **Deleted Log Report** – This report can be generated to show which service logs have been deleted from the system

- **User Information** – This report can be generated to show various user details, such as
 - User Type
 - User ID
 - Certification Information
 - Number of students on caseload
- **Provider Caseload Report** – This report can be generated to show the student ID of all students on your providers' caseloads. It also shows the total number of logs (and total time) submitted for each student, by month.
- **Medicaid Eligibility and Parental Consent Report** – This report displays the current Medicaid Eligibility Status for all students THAT HAVE BEEN ENTERED INTO EASYTRAC.
 - Only students with a "Y" in column I – Medicaid Eligible are CURRENTLY eligible
- **Services Report** – This report displays the Related Services that have been entered on the students' Related Services table. This report DOES NOT display individual service logs.
- **Active Student Extract** – This report will display any student specific information that has been entered on the student's Personal Information screen. When generating this report, the only qualifier that needs to be changed is the "Eligibility" field, change the drop down to "ALL".

Once this report is generated, it will display in a text format (columns may not line up correctly). In order to view the report in a clean format:

1. Open Microsoft Excel and create a new, blank spreadsheet
2. Highlight all cells
3. Right click anywhere in the spreadsheet
4. Select "Format Cells"
5. Select "Text" on the 'Numbers' tab (this is VERY important b/c Excel will, by default, drop any leading zeros from any numbers)
6. Click "OK"
7. Copy the entire report
8. Paste it into your newly formatted Excel file
9. Right click on your spreadsheet and select "Paste Special"
10. Click the radio button to the left of "Text"
11. Click "OK"

LOGGING OUT OF EasyTRAC™



To log out of EasyTRAC™:

1. Click the “Log Out” tab at the left of the menu bar
2. After you log out, close your browser:
 - a) Click on *File* in the upper left hand corner of your screen and then choose *Exit*.
 - b) Mac users - Click the in the upper left hand corner of your screen.
 - c) PC users – Click the ‘X’ in the upper right hand corner of your screen.

Note:

- * *You can log out from any part of the system*
- * *You do not have to go back to the Main Menu*
- * *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.



<http://publicconsultinggroup.com/client/paaccess/>

Tel: 866.912.2976

SBAPsupport@pcgus.com