



EASYTRAC™

Tracking and Documenting Services Provided to Students

End User Manual



Experience Results™

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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'S EDUCATION SERVICES PRACTICE AREA (ESPA)

PCG's Education Services Practice Area (ESPA) 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. Our expertise spans across various education administrative functions and our objective is to provide districts with the resources they need to accomplish their goals utilizing one vendor.

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.

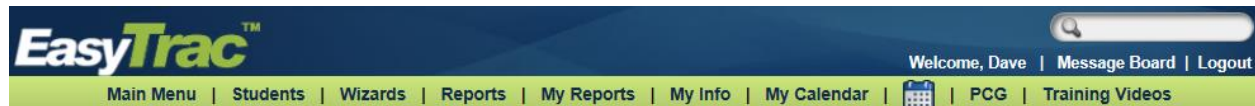
Please adhere to the following procedures to ensure security:

- **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 are 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’.**



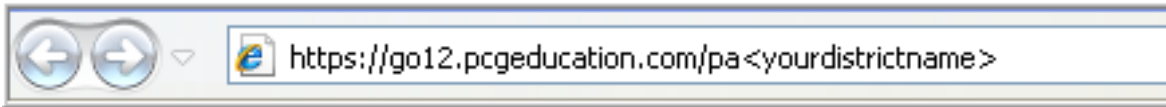
Important Symbols in EasyTRAC™

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

Logging Into The System

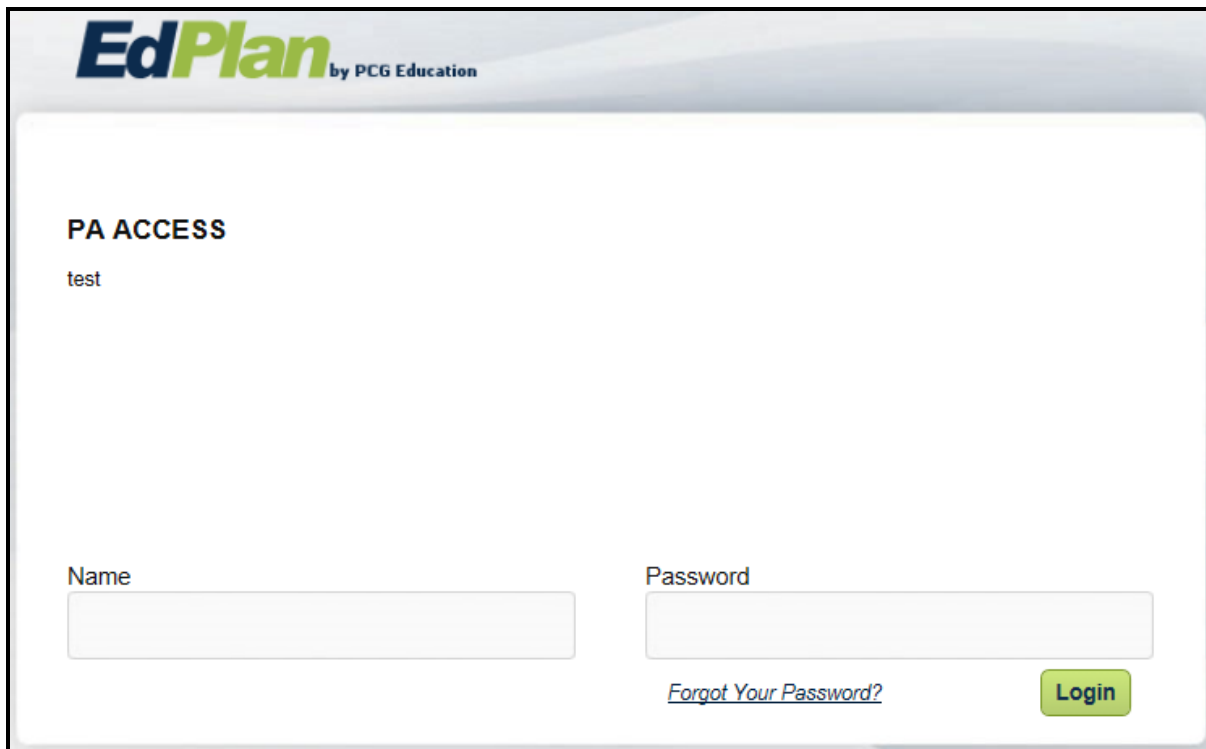
1. Open a web browser and enter your district's URL in the address bar. We recommend that you save this to your favorites or add a short-cut link to your desktop. You will login to the EasyIEP™ site; EasyTRAC™ is a component of the EasyIEP™ system.



My URL is: https://go12.pcgeducation.com/pa_____

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_____.

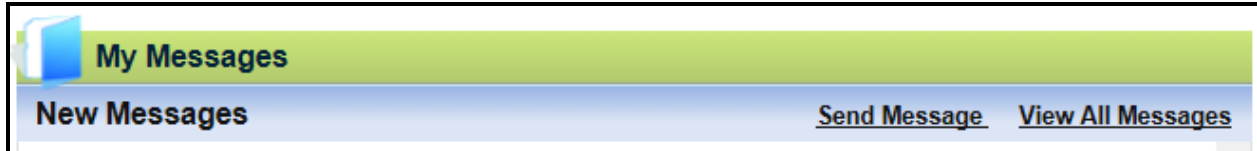
A screenshot of the EdPlan login interface. At the top left is the logo "EdPlan by PCG Education". Below it, the text "PA ACCESS" is displayed in bold, followed by "test" in a smaller font. There are two input fields: "Name" and "Password". Below the "Password" field is a link that says "Forgot Your Password?". To the right of the "Password" field is a green "Login" button.

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

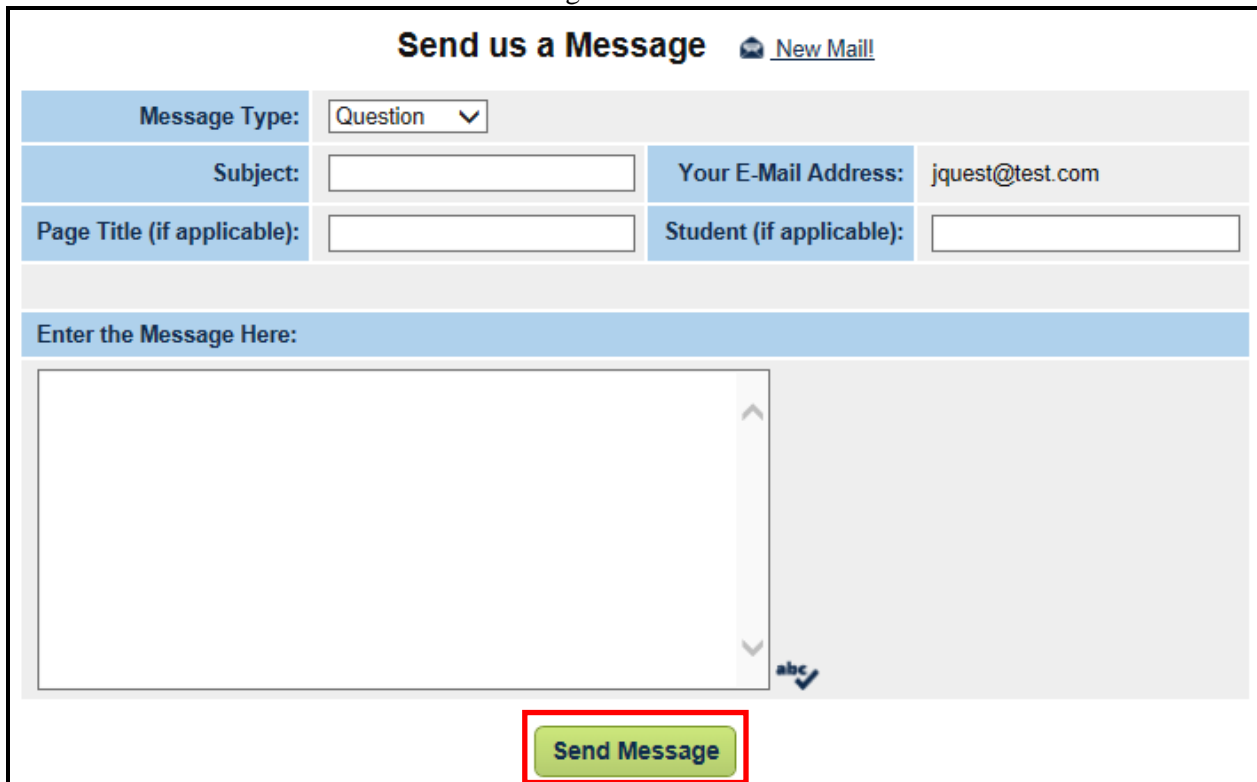
Message Board

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:



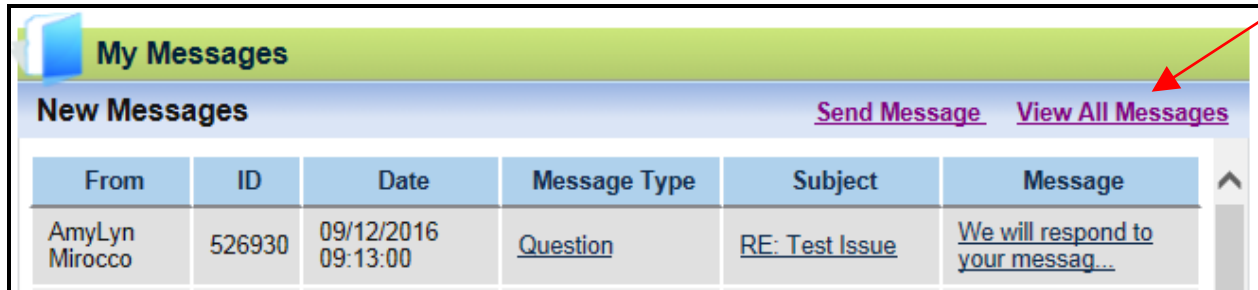
To send a Question, Bug Report, Comment or Suggestion:

1. Select which type of message you would like to send by selecting it from the *Message Type* drop down list
2. Type the subject of your message in the *Subject* box. Be as specific as possible.
3. 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.
4. Add your message to the text box.
5. Click once on the “Send Message” button.



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

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, you will see the message under your “My Messages” widget and can also select “View All Messages”.



Message of the Day

Below the *Message Board* you will find the *Message of the Day*. This message will alert you of any important information. Please check this message often to stay informed with school-wide changes or updates.

Uploaded Files

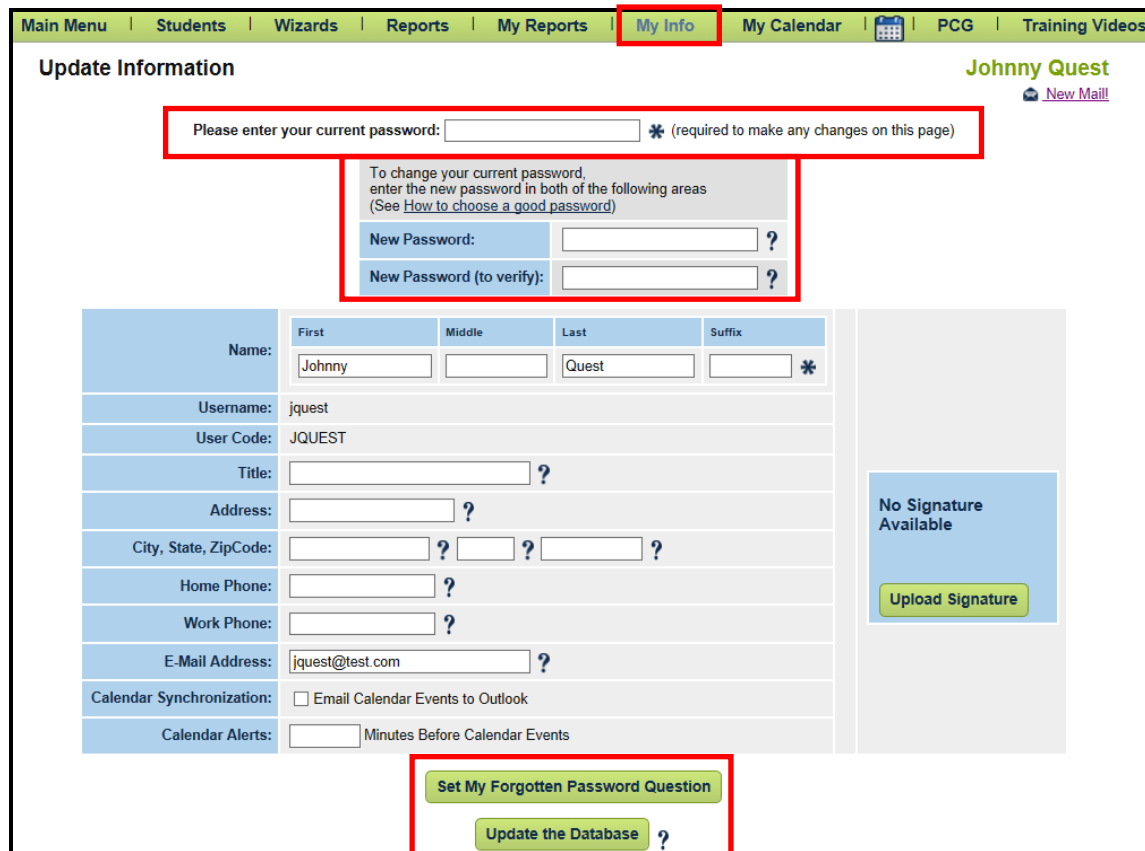
At the bottom of the *Main Menu* page you will see various files that have been made available to you for viewing or downloading. Instead of sending e-mail attachments to everyone in your district, administrators or PCG staff will often upload the necessary file to the main page of EasyTrac™. To view 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 log in 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.

Once you have logged into EasyTrac and need to change your password:

1. Click on the ‘My Info’ tab from the *Main Menu*.
2. Enter your current password.
3. Type your new password in both the password and password verification boxes.
4. Click the “Update the Database” button.



The screenshot shows the 'Update Information' page for user Johnny Quest. The navigation menu includes: Main Menu, Students, Wizards, Reports, My Reports, **My Info**, My Calendar, PCG, and Training Videos. The page title is 'Update Information' and the user name is 'Johnny Quest' with a 'New Mail' notification. A red box highlights the 'Please enter your current password:' field. Another red box highlights the 'New Password:' and 'New Password (to verify):' fields. Below these are various user information fields: Name (First: Johnny, Middle: , Last: Quest, Suffix:), Username: jquest, User Code: JQUEST, Title: , Address: , City, State, ZipCode: , Home Phone: , Work Phone: , E-Mail Address: jquest@test.com, Calendar Synchronization: Email Calendar Events to Outlook, and Calendar Alerts: Minutes Before Calendar Events. On the right, there is a 'No Signature Available' message and an 'Upload Signature' button. At the bottom, there are two buttons: 'Set My Forgotten Password Question' and 'Update the Database'.

After updating the database, a confirmation box will open. 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 ACCESS 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. Make sure your e-mail address and phone number are correct.

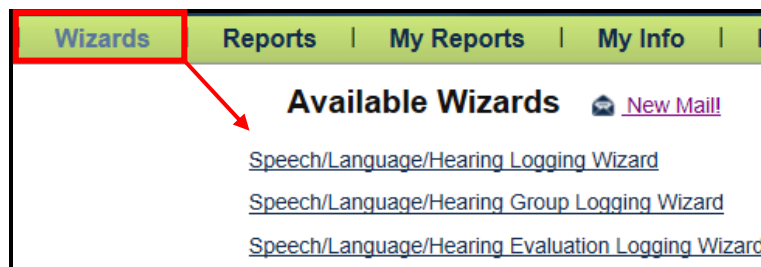
DOCUMENTING SERVICES

Using the Logging Wizard

To begin documenting your services, you will need to have all of your students added to your caseload. Once the students are added to your caseload, you will use the Service Logging Wizard for your students. Please see the “Managing Caseloads” section for more details.

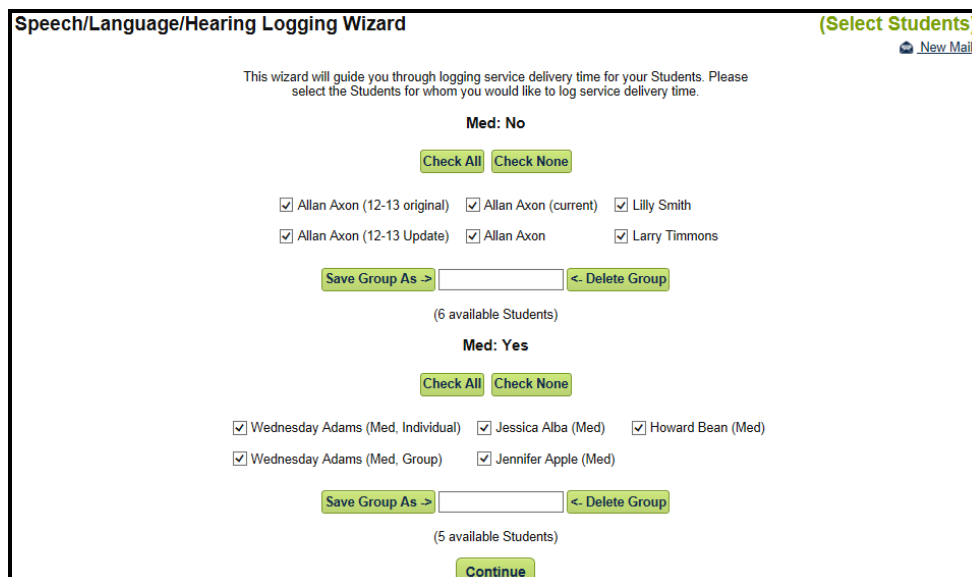
How to Document a Service Using the Logging Wizard

1. Login to EasyTRAC™
2. Click on the ‘Wizards’ tab
3. Click the Logging Wizard for the service that you provide



4. Check the boxes for the students for whom you wish to document services, click ‘Continue.’ 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.

Note: If a student is not showing up in the logging wizard that is on the user’s caseload, then the corresponding related service has not been added yet for that student. The ACCESS Coordinator will need to add the related service for that student.



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

Note: the student's name is listed in **Bold Green** 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.

6. Complete the required data fields for the service you provided, and

- a) All required fields have an Asterisk * next to them
- b) Service Types of “Student Absent”, “Student Not Available”, “Provider Absent”, and “Provider Not Available” will result in certain field no longer being required.

7. Click “Add to Table” to add the service documentation to the above table



- Once the log has been added to the table, it will appear in teal which means it still needs to be confirmed into the system.

Services Provided September 2016									
Del	Date	Start Time	End Time	Service Type	Group Size	Progress Report	Comments	Areas Covered/Assessed	
	9/1/2016	10:00 AM	10:30 AM	Direct	Indiv.	Maintaining	Enter Comments of Service Provided here	Articulation: Discrimination, Aural Rehabilitation: Survival Communication Repair Strategies	

= Logs Previously Entered by Me (signed)

= Logs Previously Entered by Someone Else (signed)

= Newly Entered Logs (not yet signed)

NOTE: Newly Entered Logs in this table are not added to the database until you confirm the new logs. To add new logs to this table, fill in the data fields below and press "Add to table". To delete any logs you've mistakenly entered, click on the garbage can icon in the 'Del' column.

Note: If the log needs to be deleted due to error in entry, click the trashcan next to the newly added log. The log will need to then be re-entered.

- You may document additional services and click 'Add to table' prior to confirming and saving the services
- Review the teal-shaded services in the *Services Provided* table. If any of the services are incorrect, you may press the trashcan icon to remove the service from the table. If all of the information is correct, you may select either:

'Confirm newly entered logs, then proceed to next student' which will save the service(s) and allow you to document services for the next student

OR

'Confirm newly entered logs, then allow me to enter more logs for this student' which will save the service(s) and allow you to enter additional services for the same student

If the second option is selected, you will be brought back to the previous screen where you can enter a new service.

Note: Once a log has been confirmed, the 'Prefill' button will appear. Clicking on this button will prefill the typical service information from the last confirmed log that may not change from one service to the next, such as 'Service Type', 'Duration of Service', 'Group Size', 'Diagnosis Code', 'Description of Service' and 'Areas Covered/Assessed', thus reducing your time spent documenting services.

Time Spent: 1 sessions/day of 30 minutes
 Group Size: Indiv.
 Individual
 Doctor Authorization: Not on File

Services Provided August 2016									
Del	Date	Start Time	End Time	Service Type	Group Size	Progress Report	Comments	Areas Covered/Assessed	
<input type="checkbox"/>									

= Logs Previously Entered by Me (signed)

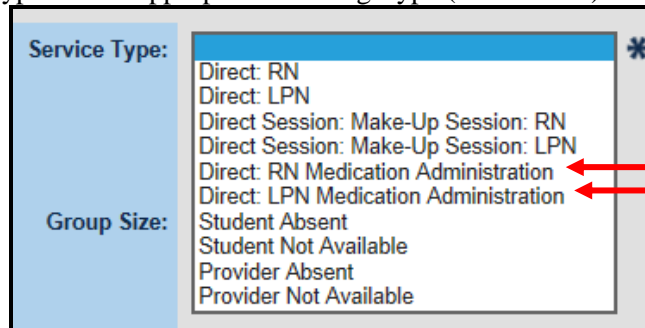
= Logs Previously Entered by Someone Else (signed)

= Newly Entered Logs (not yet signed)

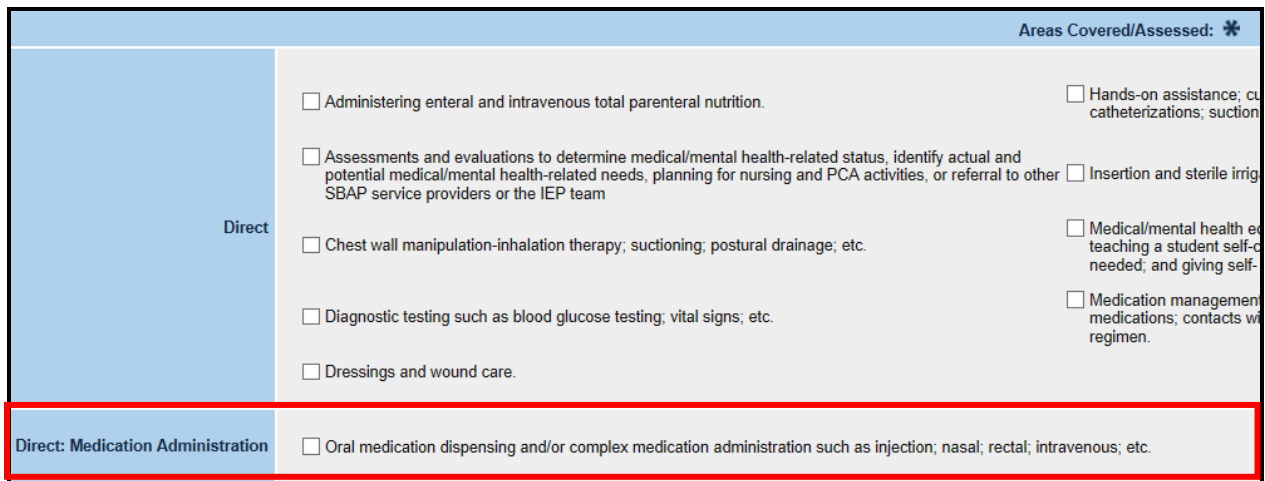
NOTE: Newly Entered Logs in this table are not added to the database until you confirm the new logs. To add new logs to this table, fill in the data fields below and press "Add to table". To delete any logs you've mistakenly entered, click on the garbage can icon in the 'Del' column.

Documenting Nursing Medication Administration Services

1. Click on the “Wizards” tab on the top of your Internet window
2. Click the “Nursing Logging Wizard”
3. Check the boxes for the student for whom you wish to document services, then click “Continue”
4. To log for Medication Administration, you will select the “Medication Administration” service type for the appropriate Nursing Type (RN or LPN).



5. Complete all required information for the log, selecting the appropriate Areas Covered/Assessed that corresponds with Medication Administration



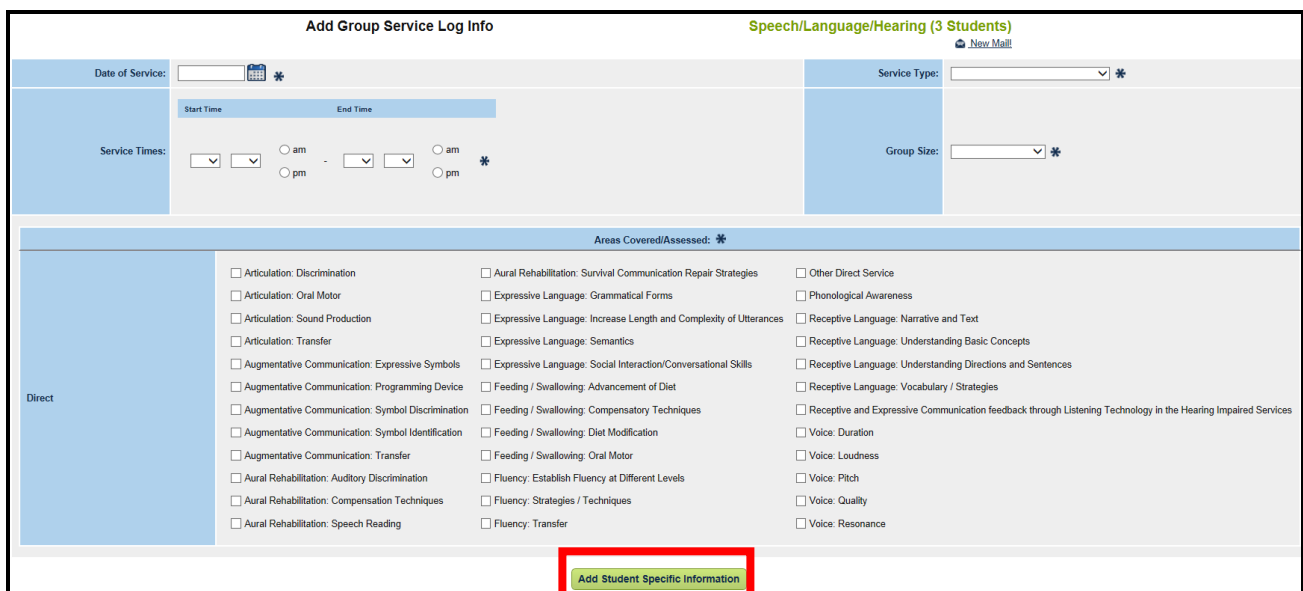
Note: A selection of the “Direct: Medication Administration” Areas Covered/Assessed will NOT be able to be combined with any other Areas Covered/Assessed. All Medication Administration logs will need to be logged separately from Direct Nursing Service logs.

Documenting Group Services

1. Click on the “Wizards” tab on the top of your Internet window
2. Click the ‘Group Logging Wizard’ for the service that you provide
3. Check the boxes for the students for whom you wish to document services, then click ‘Continue’

Note: You should only check off students that were in the same group session, on the same day, at the same time.

4. Complete the data fields that apply to the entire group for the service you provided, then click ‘Add Student Specific Information’ to add the data that applies to each specific student



Add Group Service Log Info Speech/Language/Hearing (3 Students) [New Mail](#)

Date of Service: * Service Type: *

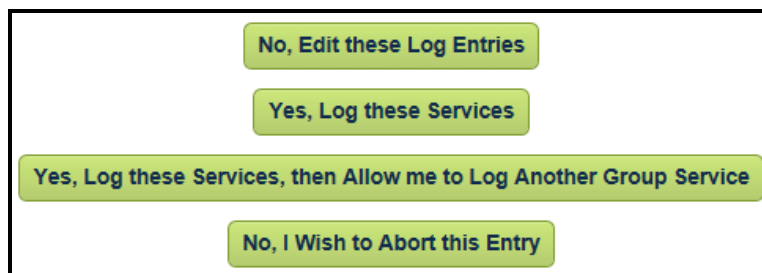
Service Times: Start Time: am pm End Time: am pm * Group Size: *

Areas Covered/Assessed: *

<input type="checkbox"/> Articulation: Discrimination	<input type="checkbox"/> Aural Rehabilitation: Survival Communication Repair Strategies	<input type="checkbox"/> Other Direct Service
<input type="checkbox"/> Articulation: Oral Motor	<input type="checkbox"/> Expressive Language: Grammatical Forms	<input type="checkbox"/> Phonological Awareness
<input type="checkbox"/> Articulation: Sound Production	<input type="checkbox"/> Expressive Language: Increase Length and Complexity of Utterances	<input type="checkbox"/> Receptive Language: Narrative and Text
<input type="checkbox"/> Articulation: Transfer	<input type="checkbox"/> Expressive Language: Semantics	<input type="checkbox"/> Receptive Language: Understanding Basic Concepts
<input type="checkbox"/> Augmentative Communication: Expressive Symbols	<input type="checkbox"/> Expressive Language: Social Interaction/Conversational Skills	<input type="checkbox"/> Receptive Language: Understanding Directions and Sentences
<input type="checkbox"/> Augmentative Communication: Programming Device	<input type="checkbox"/> Feeding / Swallowing: Advancement of Diet	<input type="checkbox"/> Receptive Language: Vocabulary / Strategies
<input type="checkbox"/> Augmentative Communication: Symbol Discrimination	<input type="checkbox"/> Feeding / Swallowing: Compensatory Techniques	<input type="checkbox"/> Receptive and Expressive Communication feedback through Listening Technology in the Hearing Impaired Services
<input type="checkbox"/> Augmentative Communication: Symbol Identification	<input type="checkbox"/> Feeding / Swallowing: Diet Modification	<input type="checkbox"/> Voice: Duration
<input type="checkbox"/> Augmentative Communication: Transfer	<input type="checkbox"/> Feeding / Swallowing: Oral Motor	<input type="checkbox"/> Voice: Loudness
<input type="checkbox"/> Aural Rehabilitation: Auditory Discrimination	<input type="checkbox"/> Fluency: Establish Fluency at Different Levels	<input type="checkbox"/> Voice: Pitch
<input type="checkbox"/> Aural Rehabilitation: Compensation Techniques	<input type="checkbox"/> Fluency: Strategies / Techniques	<input type="checkbox"/> Voice: Quality
<input type="checkbox"/> Aural Rehabilitation: Speech Reading	<input type="checkbox"/> Fluency: Transfer	<input type="checkbox"/> Voice: Resonance

Add Student Specific Information

5. The Service Type and Areas Covered/Assessed will carry over from the first page into the Student Specific pages. On the Student Specific Information page, further information can be added or changed to reflect the session for that student including Progress Report, Daily Progress Note, and further Areas Covered/Assessed.
6. Review the services for each student and at the bottom of the page, you have four options:



7. If changes need to be made to entries, select “No, Edit these Log Entries” to return to the previous page. Otherwise,

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>.

Requesting That a Service Log Be Removed

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

Select a Student (Caseload of Dave Speech) New Mail											
CP	Last Elig	Last IEP	School	Grade	Name	Student ID	PA Secure ID	Age	Date of Birth	Dis	Case Manager
	08/20/2013	01/10/2015	TMS	9	Wednesday Adams	4813	4813	10 Years	10/31/2005	SLI	
	08/01/2012	07/05/2015	TMS		Jessica Alba	029384098	6549873210	16 Years	08/02/2000	ID	
		07/01/2012	TOP	6	Jennifer Apple	09810928	092830498	16 Years	06/02/2000	ED	
		05/01/2013	TMS		Allan Axon	1712496736	1712496736	19 Years	07/20/1997	AUT	
	08/01/2013	01/01/2014	THS		Howard Bean	23423423416	23423423416	16 Years	09/02/2000	ID	
		10/01/2014	TMS	5	Lilly Smith	7219738540	7219738540	12 Years	01/01/2004	AUT	
		01/02/2015	TMS2	4	Larry Timmons	0020049738	0020049738	8 Years	01/16/2008	MD	



2. Search for the student or select a student from the Caseload List
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

Related Services							
View: <input type="text" value="Workspace"/>							
Related Service	Amount of Service	Consult	ESY	Pct	?	?	
Speech/Language/Hearing				0.00			
Personal Care Assistant	1 sessions/day of 8 hr			0.00		----	
Special Transportation				0.00		----	
Nursing				0.00		----	
Psychological Evaluation				0.00		----	
Psychology				0.00		----	
Physical Therapy				0.00		----	
Percent - Special Ed Services:				0.00			
Percent - Related Services:				0.00			
Total Percent in Special Education:				0.00			

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

- Click the 'View Service Log' button

Service Name:	Speech/Language/Hearing	
SubArea:		
Provider:		
Begin Date:		
End Date:		
Doctor Authorization:	Start Date: ?	End Date: ?
Group Size:		
Location:		

View Service Log --> ? On or After: 08/12/2016  ? Before: 09/13/2016  ? (1 logs exist from 08/02/2016 to 08/02/2016)

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.

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

Request Removal	Log ID	Date	Service Type	Provider	Duration of Service	Start Time	End Time	Group Size	Progress Report	Daily Progress Note	Areas Covered/Assessed	
<input type="checkbox"/>	753	08/02/2016	Direct	Dave Speech	1:00	09:00 AM	10:00 AM	Indiv.	Maintaining	Enter log information here	Articulation: Discrimination Augmentative Communication: Symbol Discrimination Receptive Language: Vocabulary / Strategies	Details

= Log Pending Approval

[Update the Database](#)

- Click the box under 'Request Removal' for the log you wish to have removed
- Click 'Update the Database'

Request Removal	Log ID	Date	Service Type	Provider	Duration of Service	Start Time	End Time	Group Size	Progress Report	Daily Progress Note	Areas Covered/Assessed	
<input type="checkbox"/>	753	08/02/2016	Direct	Dave Speech	1:00	09:00 AM	10:00 AM	Indiv.	Maintaining	Enter log information here	Articulation: Discrimination Augmentative Communication: Symbol Discrimination Receptive Language: Vocabulary / Strategies	Details

= Log Pending Approval

[Update the Database](#)

- In the drop-down box marked "Are you sure you wish to request removal of this service log?" choose 'Yes' to have the log removed

- Type your reasons for needing the log to be removed in the text box and click on 'Request Log Removal'

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	Service Type	Provider	Duration of Service	Group Size	Progress Report	Comments
08/02/2016	Direct	Dave Speech	1:00	Indiv.	Maintaining	Enter log information here

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

Yes, I wish to request that this log entry be removed
 No, I do not want this log entry removed

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

- 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 removed from the system.

DOCUMENTS TAB

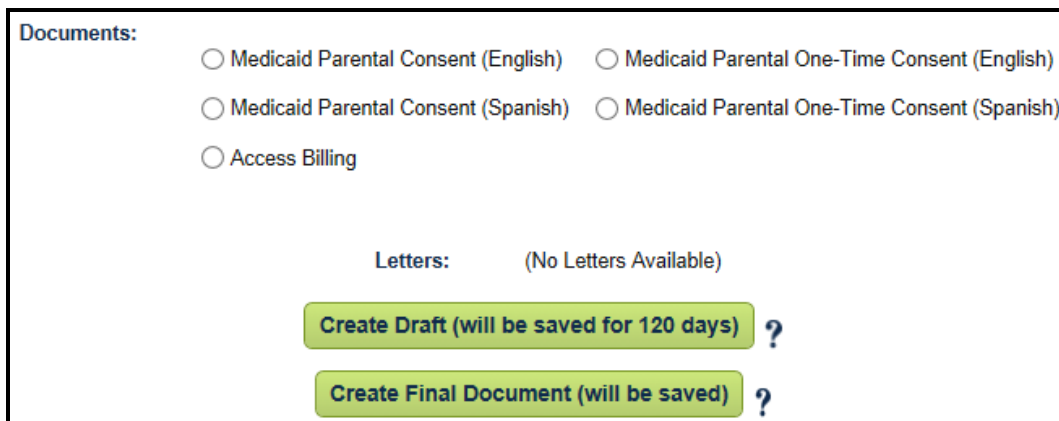
Users have the ability to create a document that displays all services logs entered, whether approved or not yet approved. This document can be used for any service provider that needs supervisor sign off.

Completing the Access Billing document

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.

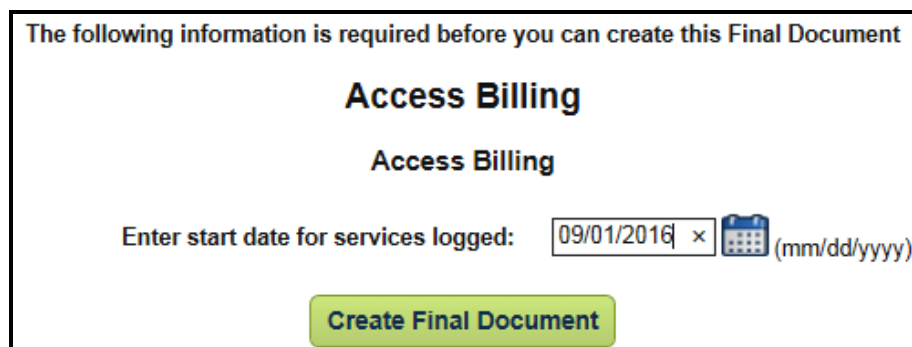
Printing the Access Billing document for supervisor signature

1. Click the ‘Students’ tab from the *Main Menu*
2. Search for the student or select from the Caseload List
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**



The screenshot shows a 'Documents:' section with five radio button options: 'Medicaid Parental Consent (English)', 'Medicaid Parental One-Time Consent (English)', 'Medicaid Parental Consent (Spanish)', 'Medicaid Parental One-Time Consent (Spanish)', and 'Access Billing'. Below these options, it says 'Letters: (No Letters Available)'. At the bottom, there are two green buttons: 'Create Draft (will be saved for 120 days) ?' and 'Create Final Document (will be saved) ?'.

6. Select “Create Draft” or “Create Final Document”
7. Identify the start date for the month of service logs to be printed. The document will print the full month.



The screenshot shows a message: 'The following information is required before you can create this Final Document'. Below this, the title 'Access Billing' is displayed twice. Then, it says 'Enter start date for services logged:' followed by a date input field containing '09/01/2016', a calendar icon, and the text '(mm/dd/yyyy)'. At the bottom, there is a green button labeled 'Create Final Document'.

LOGGING OUT of EasyTRAC™



To log out of EasyTRAC™

1. Click the “Log Out” tab at the right 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.

