PCG Education

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EasyTrac™ Medicaid FFS Documentation Quick Reference Card

Open your web browser (Internet Explorer, Firefox, Chrome, etc.). Type the following web address:

https://go12.pcgeducation.com/pa_______________

Type your user name and password. Your user name is your first name initial (no space) and last name (example: JSmith). Your password will be assigned to you by PCG during training. Once you have logged in, please change your password by clicking on the "My Info" tab. Your user name will never change. Always remember to log out when you are done with your EasyTrac™ session.

My Info

The first time you log in to EasyTrac™ please click on the "My Info" tab to change your password. Passwords are case-sensitive and should be kept secure at all times. Update your personal information including your title, work phone number and email address.

Main Menu and Message Board

When you first log in you will be taken to the Main Menu page. The Message Center can be used by your district and PCG to post messages and important information. The Document Library at the bottom of the Main Menu page lists documents available for you to download.

The Message Board is the most secure way to ask questions, give suggestions, or report issues. These links are found at the top of the Main Menu page. Simply click on the blue hyperlinks and fill out the required information. Due to HIPAA requirements please use the message board when needing to exchange confidential information. Do not send student information to PCG through email.

When we reply to your message, you will receive an email indicating there is a new message in your EasyTrac™ mailbox. Sign in to EasyTrac™ and click on the envelope to the right of the Message Center banner to read our reply.

Document Services using the Standard Wizard

- Log in to EasyTrac™
- Click the Wizards tab
- Click the “Logging Wizard”
- Your caseload will appear and all students will be checked
- You may log services for all students or click “Uncheck All” and select certain students and click "Continue"
- You may save subsets of students as a group. Select the students, label the subset, and click “Save Group As”
- Document the service for the student that you served. The student's name is listed in blue letters on the top of the page.
- Make sure to fill out the Date, Service Type, Duration of Service, Group Size, Progress Report, Description of Service section, and Areas Covered/Assessed. Required fields are marked with an (*).
- "Pre-fill" button: Clicking on this button will pre-fill the typical service information that does not change from one service to the next such as Service Type, Group Size, and Areas Covered/Assessed. This is designed to make the documentation process as efficient as possible.
- After documenting the service click "Add to Table"
- The service will then appear in the table at the top of the screen in turquoise indicating that it is a newly entered log. The turquoise-colored logs in this table can be removed until they are confirmed. If you need to remove the service click on the garbage can icon to the left of the service and re-enter it. Note: if there is an error in the service note, you must delete the note and re-document it.
- Carefully review the service confirmation screen. If all information is correct you may select either: "Yes, log this service, then proceed to the next student/service" which will save the service and allow you to document services for the next student, or "Yes, log this service, then allow me to log another instance for this student/service". This will allow you to enter additional services for the same student.
- Once the services are confirmed they turn gray and cannot be deleted from the table on this screen.
- You will notice that some entries on the table are light grey and some are dark grey. Logs entered by you will appear in dark grey while logs entered by others will appear in light grey.
- Repeat these steps until you have documented all services.

Document Services using the Monthly Wizard

The “Monthly Logging Wizard” provides a quick way to log multiple services for a student during one session.

- Click the “Wizards” tab
- Click the “Monthly Logging Wizard”
- On the drop down menu in the upper right of the page choose the month for which you want to document. Record the service for each student that you serve. Verify that you are logging a service for the correct student.
- After documenting the service click "Add to Table"
- The service will then appear in the table at the top of the screen in turquoise indicating that it is a newly entered log. The turquoise-colored logs in this table can be removed until they are confirmed. If you need to remove the service click on the garbage can icon to the left of the service and re-enter it. Note: if there is an error in the service note, you must delete the note and re-document it.
- Review the services you have entered in the table at the top of the page. If all of the information is correct you may select either: "Confirm newly entered logs then allow me to enter more logs for this student" or "Proceed to the next student".
- Once the services are confirmed they turn gray and cannot be deleted from the table on this screen.
- You will notice that some entries on the table are light grey and some are dark grey. Logs entered by you will appear in dark grey while logs entered by others will appear in light grey.

Document Services using the Group Logging Wizard

The “Group Logging Wizard” provides a quick way to log group services.

- Click the Wizards tab
- Click the "Group Logging Wizard"
- You should now see a list of students from your caseload. Select the students for whom you would like to log a group service. These are students that you served in a group setting at the same time on the same day for the same amount of time. The student selection applies to one group service log. Click the button at the bottom of the screen to continue.
- Now select the group service information: Date of Service, Service Type, Duration, Group Size, and Areas Covered/Assessed. The "Areas Covered/Assessed” selections on this screen should be those covered with the entire group. You will have the opportunity to add areas covered on the next screen if the selections vary from student to student. When you are finished, click “Add Student Specific Information”.
- Enter the Progress, Description of Service, and update the Areas Covered/Assessed if necessary for each student. Click the button at the bottom of the screen to continue. Note: If a student is absent, instead of removing him/her from the group, “Student Not Present” should be selected from the Service Type dropdown menu.
- The confirmation screen will allow you to review each service that is about to be logged. At the bottom of the page, there are three buttons. “Yes, log these services” will log all of the services. “No, I wish to abort this entry” will cancel the entire group log. The “Edit log entries” button will return you to the page where the student specific information is entered allowing you to correct any errors.

View Services

- For districts that use EasyTrac™, click on “Reports” from the “Main Menu” tab. For districts that use EasyTrac™ and EasyIEP™, you can access “Reports” by clicking on the “School System” tab first.
- Click “Service Log Report”
- Select a date range for services you wish to view; enter a Start Date and an End Date. Click the “Next” button to continue.
- Select a student by clicking on the student’s name. This will bring you to a list of the services you provided to that student during the specified date range.
- If you want to view the details of the service, including duration and comments, click on the “View “link to the right.
- If you want to view services for another student, click the back button to bring you back to the student list.

Request a Service Log Deletion

- Follow the instructions listed in “View Services” section of this information card
- Click “Request Removal “ next to the service log you wish to have removed
- Click “Update the Database”. You will be directed to a confirmation screen.
- Type a simple reason for why you wish to have the log deleted and click “Request Log Removal”. You can immediately re-log the service.
- After a log has been requested to be removed, viewing the log will display a red X in the “Request Removal” column. The X will remain until the log has been deleted by PCG staff.

Print Services

- Go to the Reports tab
- Select “Printable Service Report”
- Enter a date range of services to print.
- Enter a student ID (leaving blank will print all students on your caseload)
- If appropriate, select “Page Break between Students”
- Select “Generate Report”
- You will receive an email confirmation when the report has been generated.
- The report will be delivered to your Reports Inbox tab where you can view and choose to print. You may need to go back the Main Menu to see the Reports Inbox tab.