EasyTrac™ End User Manual

Tracking and documenting services provided to students

September 2019

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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.

THE SCHOOL-BASED ACCESS PROGRAM (SBAP)

The Pennsylvania School-Based Access Program (SBAP) is a program through the Department of Human Services (DHS) that allows LEAs to receive reimbursement for health-related services provided to MA-enrolled children who are under 21 years of age when those services are documented in the child's IEP.

Public Consulting Group, Inc. (PCG) is the Lot 1 vendor for the Pennsylvania School-Based Access Program. Lot 1 services include operating and maintaining the EasyTrac billing system used to submit claims to DHS for direct services and special transportation.

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 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™

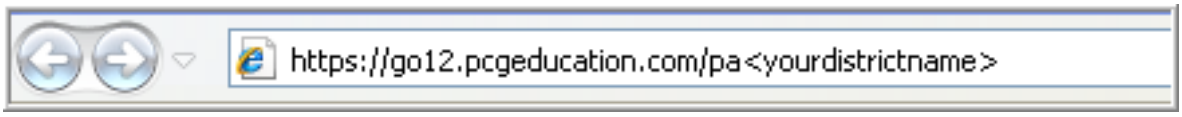
Below is a list of icons and a description of functionality for each that appears on many system pages:

	Help - This link shows general help information. See the End User Manual for updated, specific information.
	Drop down menu - Only one selection can be made. Click once on the gray box and select an option.
	Check box - More than one selection can be made. To add or remove a check, click once on the box.
	Spell Check icon – Click on the icon to launch the spell check function for a specific text box.
	Calendar icon – To add a date, click on the calendar and scroll through the screens to find the appropriate date.
	White Check Mark—Special Education eligibility date was not entered for student
	Green Check Mark—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

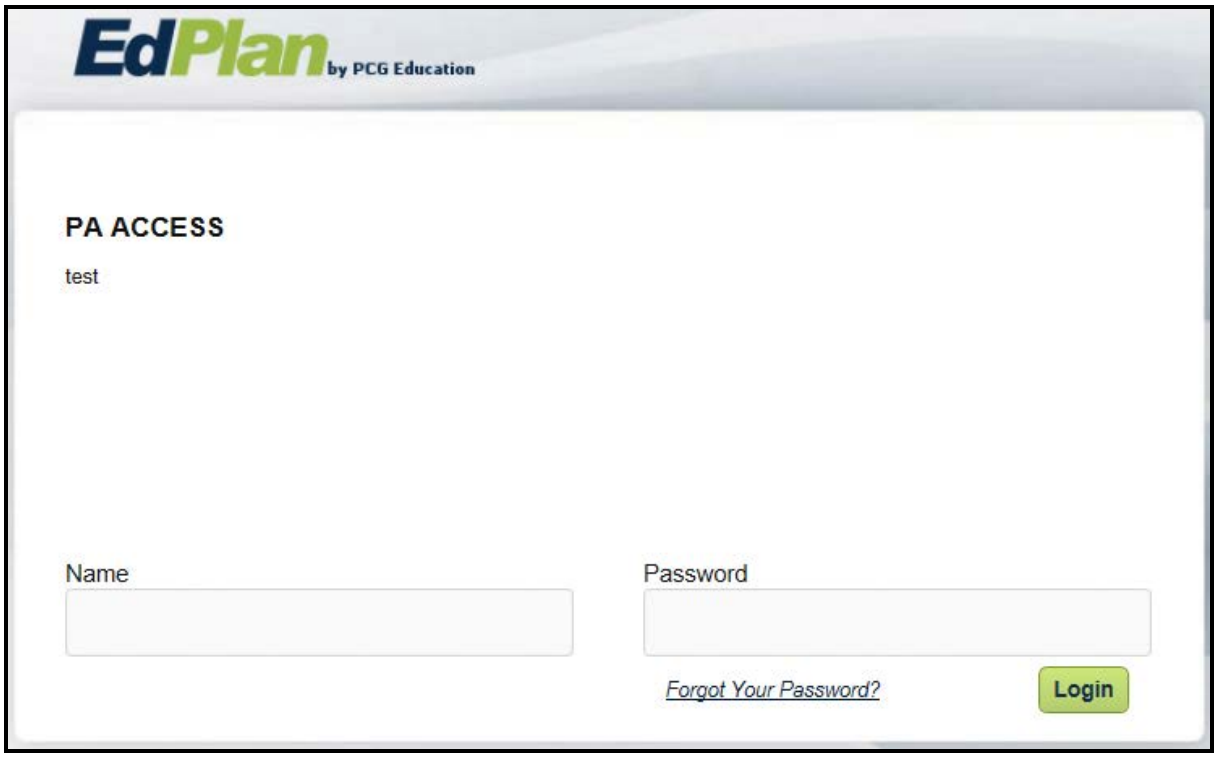
1. Open a web browser and enter your district's URL in the address bar. We recommend that you save this to your favorites or add a short-cut link to your desktop. You will login to the EdPlan™ site; EasyTrac™ is a component of the EdPlan™ system.



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_____.*



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.*

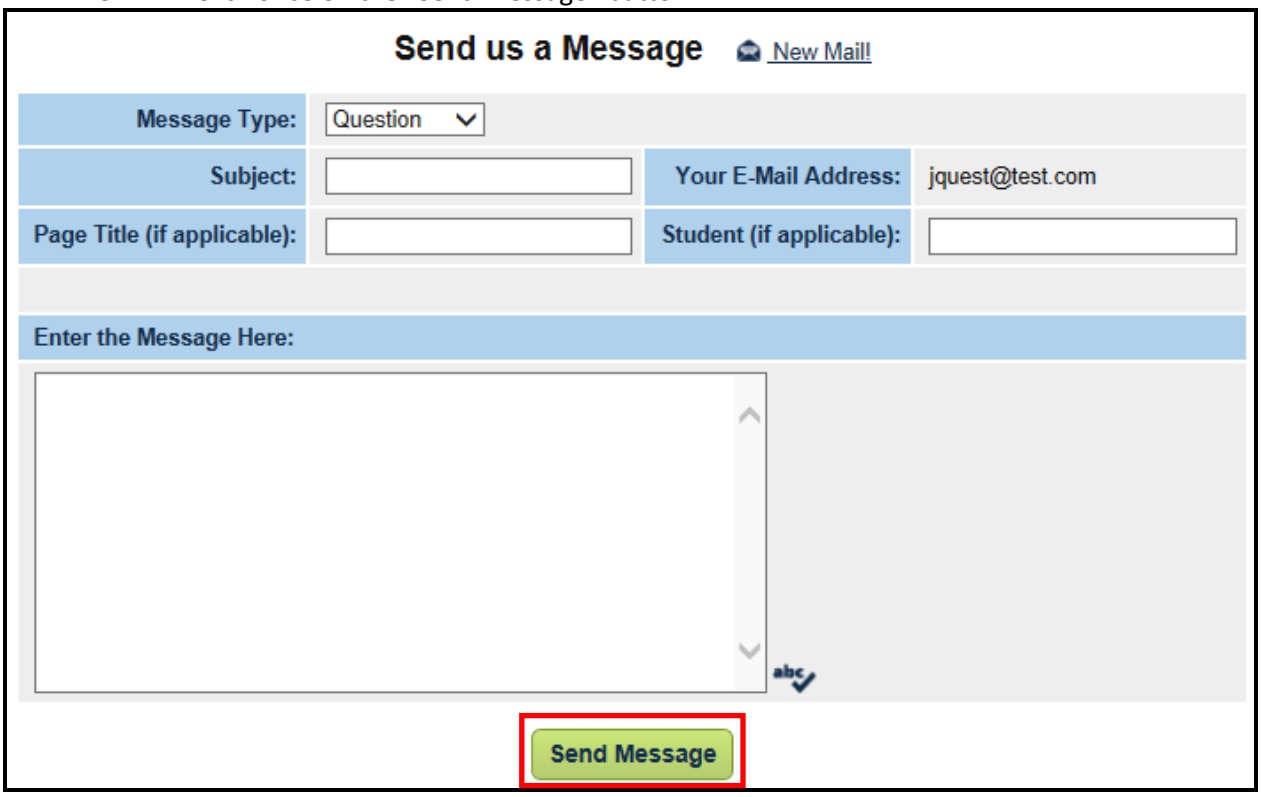
MAIN MENU TAB

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:

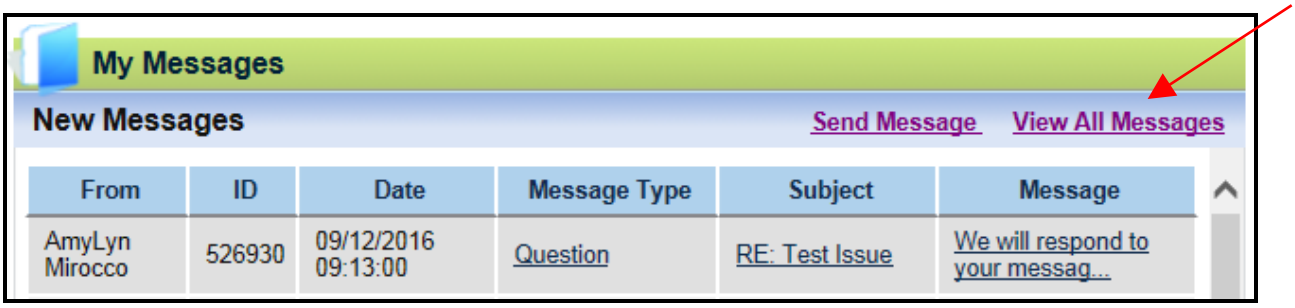
To send a Question, Bug Report, Comment or Suggestion:

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.



<u>Question, Comment, Suggestion, and Bugs:</u> Use these links for all questions, comments, reporting of bugs, 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

Above the *Message Board* you will find the *Message of the Day*. This message will alert you of any important information regarding the EasyTrac™ system or the Program. Please check this message often to stay informed with changes or updates.

Uploaded Files

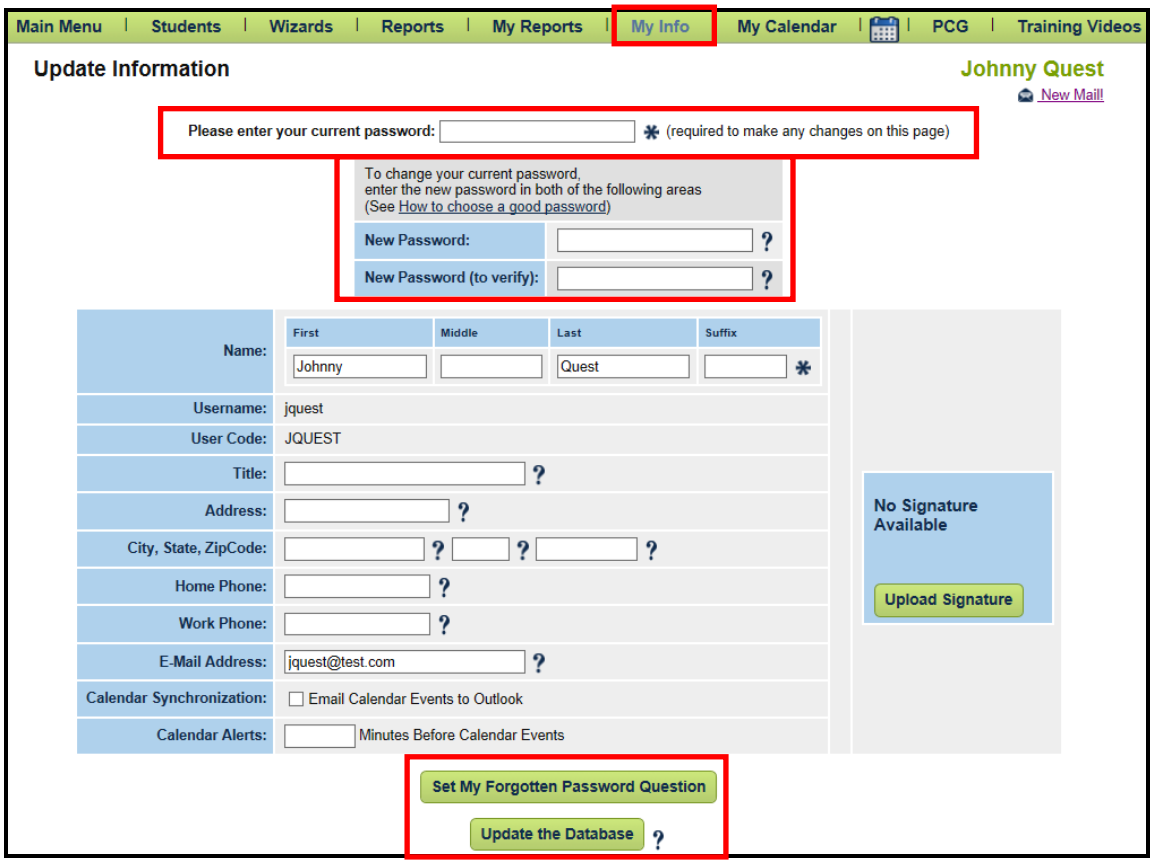
At the bottom of the *Main Menu* page you will see various files that have been made available to you for viewing or downloading. Instead of sending e-mail attachments to everyone in your district, administrators or PCG staff may upload the necessary file to the main page of EasyTrac™. To view a file,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



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.

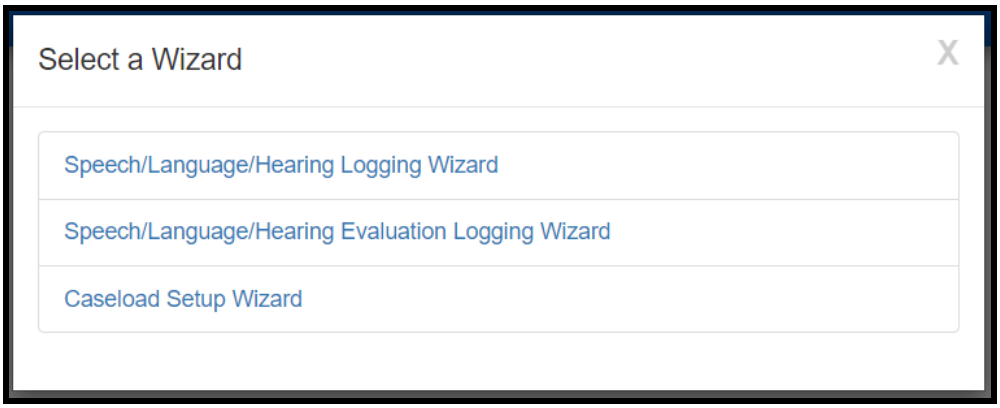
DOCUMENTING SERVICES

Using the Logging Wizard

To begin documenting your services, you will need to have all your students added to your caseload. Once the students are added to your caseload, you will use the Service Logging Wizard for your students. Any changes to a user's caseload must be completed by the districts Access Administrator.

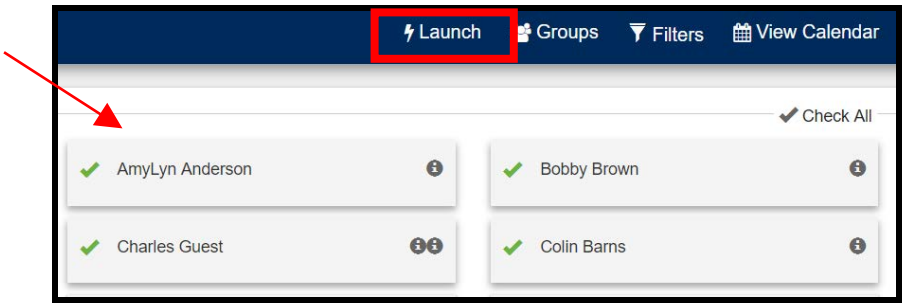
How to Document a Service Log Using the Logging Wizard

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



4. Select the student(s) you wish to document services and click 'Launch.'

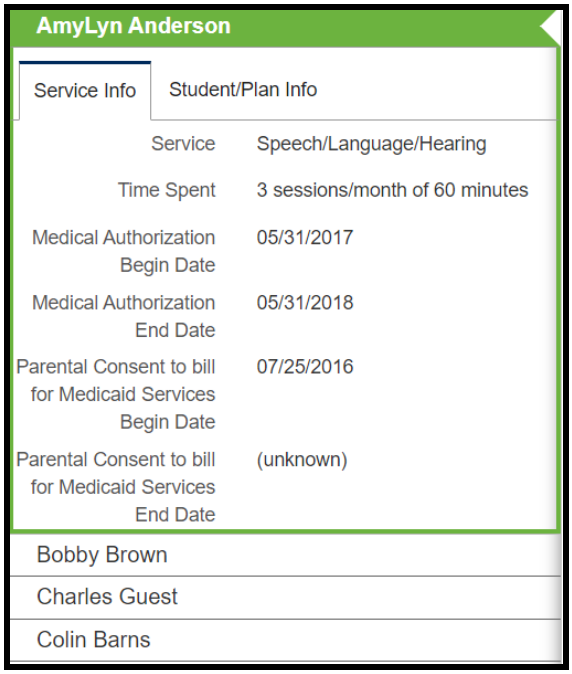
Note: The students listed under **Med: No** are NOT CURRENTLY eligible for MA services. The students listed under **Med: Yes** ARE CURRENTLY eligible for MA services.



Note: If a student already on a user's caseload is not showing up in the logging wizard, the corresponding related service has not been added yet for that student. The ACCESS Administrator will need to add the related service to the students EasyTrac profile.

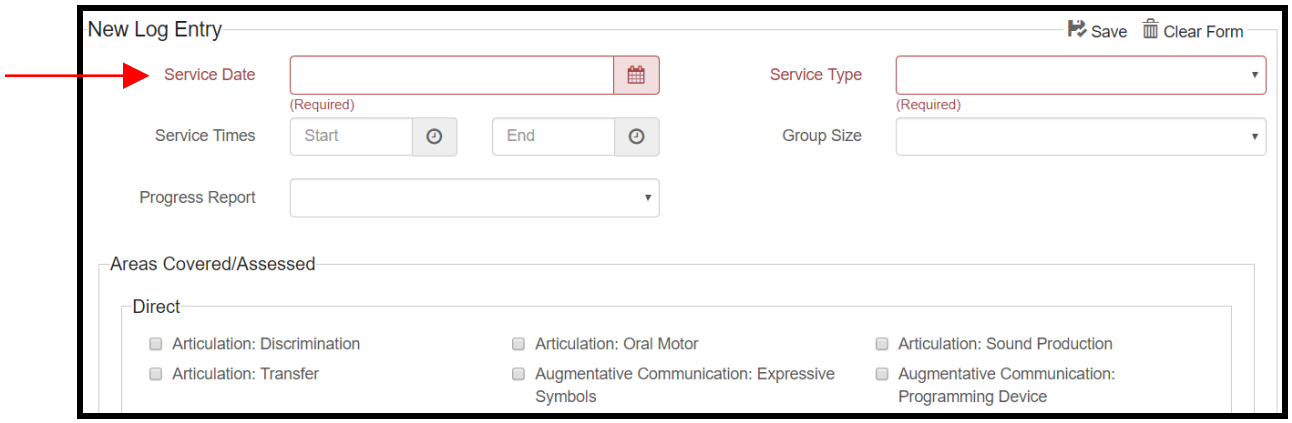
5. Verify that you are logging a service for the correct student.

Note: The list of student(s) selected on the previous page will appear on the left side of your internet browser. The current student you are going to enter logs for will be highlighted in Green with all other selected students listed below.



The "Service Info" tab under the students name will feature available Compliance Data items and Frequency/Duration of the service, as entered into the students profile. The "Student/Plan Info" tab will feature Demographic information for the student including Date of Birth.

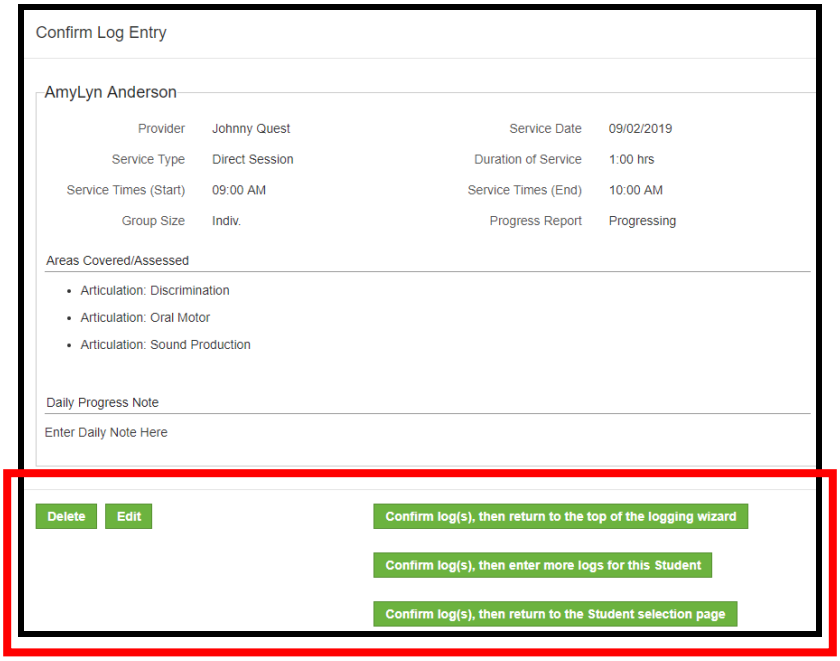
6. Complete the required data fields for the service you provided.



a) All required fields are highlighted in Red.
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 "Save" when completed with the service log.

8. Once the log has been Saved, a confirmation box will appear allowing you to review the log.



Service logs are entered and confirmed to the system one at a time. Upon saving, you will be provided the following choices:

Delete: Will remove all data from the log entered and allow you to start over.

Edit: Will return you to the previous screen to make corrections on the log.

Confirm log(s), then return to the top of the Logging Wizard: Will confirm the entered log and return you to the Wizards tab to select a new Logging Wizard

Confirm log(s), then enter more logs for this student: Will confirm the entered log and return you to the logging screen to continue documenting further logs.

Confirm log(s) then return to the Student selection page: Will confirm the entered log and return you to the student selection page under the current Logging Wizard.

How to document a service log using the "Prefill" function

Once a log has been confirmed via steps 1-8 in the previous section, the log will appear at the top of the screen with a 'Prefill' icon available. To use the prefill button for further log entry:

1. Select the icon under the "Prefill" column next to the log you want to fill in the data from.

2. The new service log will be populated based off the data from the log selected.

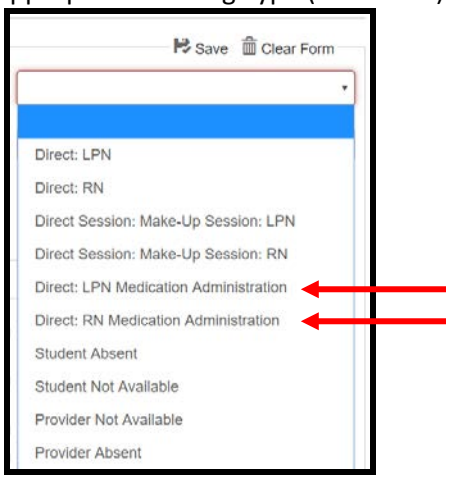
Note: The specific fields that will prefill are:

- Service Type
- Service Times
- Group Size
- Areas Covered/Assessed

The remaining fields are required to be entered manually with the completion of each service log. Logs must contain documentation showing the differences and needs of the student for each encounter.

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 "Launch"
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

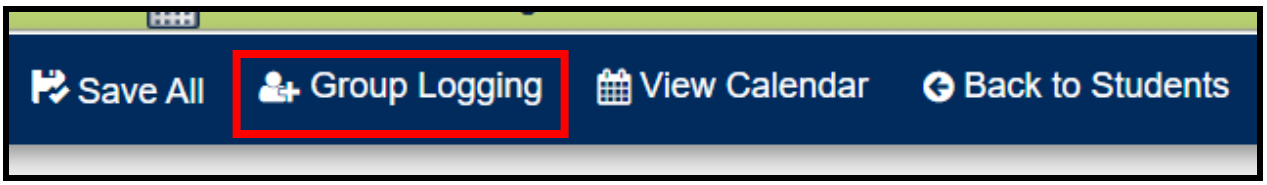
Note: A selection of the "Direct: Medication Administration" Areas Covered/Assessed will NOT be able to be combined with any other Areas Covered/Assessed. All Medication Administration logs will need to be logged separately from Direct Nursing Service logs.

Documenting Group Services

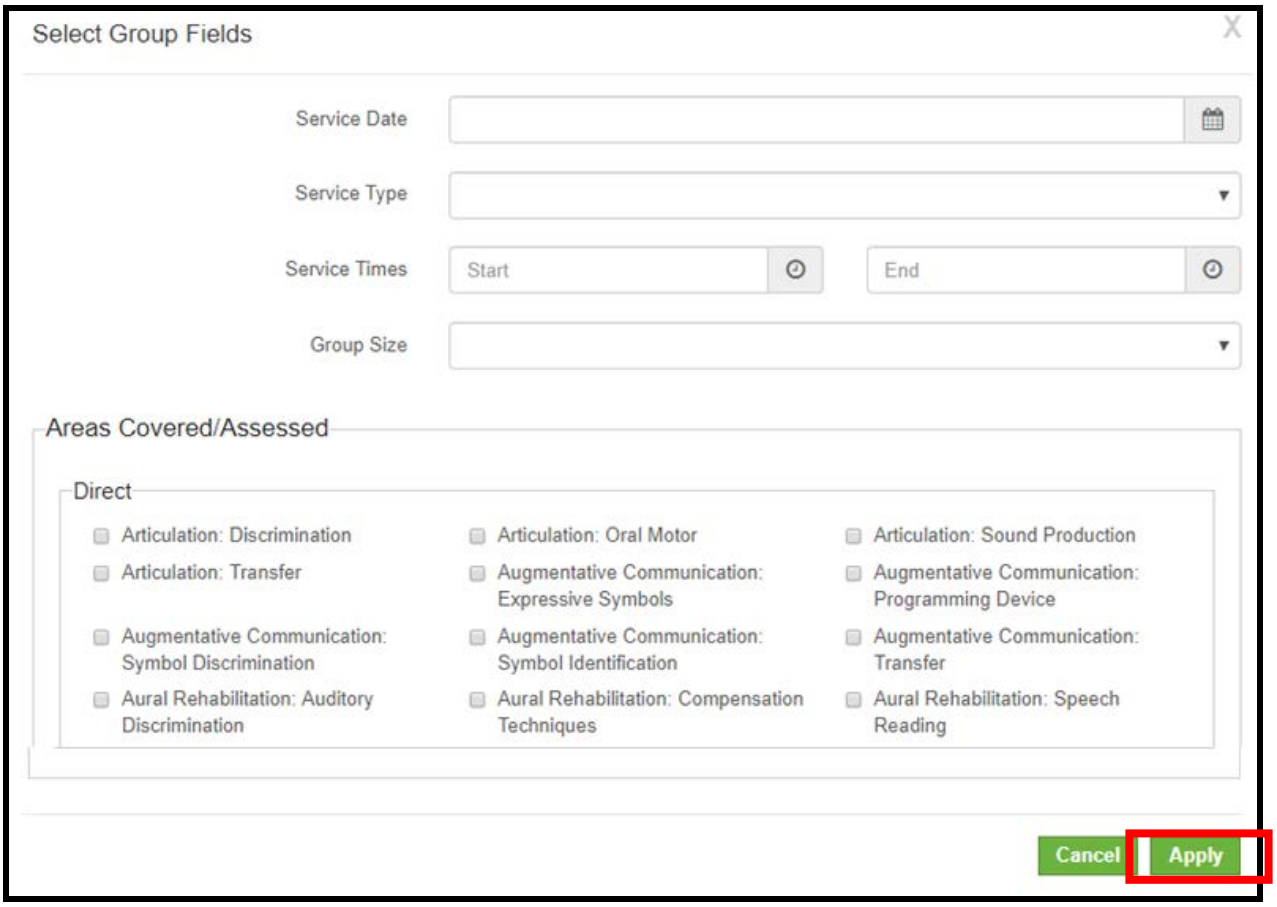
1. Click on the "Wizards" tab on the top of your Internet window
2. Click the Logging Wizard for the service that you provide
3. Check the boxes for the students for whom you wish to document services, then click 'Launch'

Note: You should only check off students that were in the same group session, on the same day, at the same time. Service provided to one student only cannot be documented as a Group Service in EasyTrac.

4. Once in the Wizard, select "Group Logging" from the top right side of the page

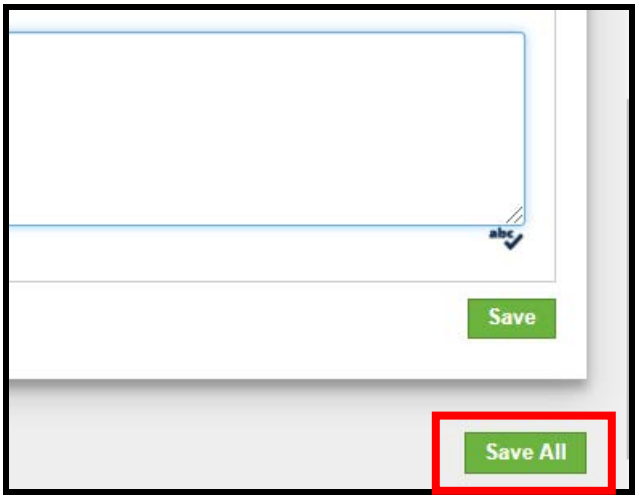


5. Complete the data fields that apply to the entire group for the service you provided, then click 'Apply' to add the data that applies to each specific student

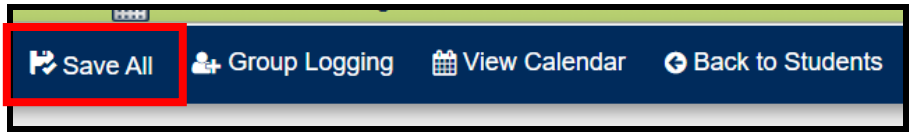


6. The Service Date, Service Type, Service Times, Group Size, and Areas Covered/Assessed will carry over from the first page into the Student Specific pages. On the Student Specific Information page, further information can be added or changed to reflect the session for that student including Progress Report, Daily Progress Note, and further Areas Covered/Assessed.

7. Review the services for each student. When finished, select "Save All" at the bottom of the page.



"Save All" is also available at the top of the page in the blue Wizard Menu



8. If changes need to be made to entries, select "Edit" on the confirmation screen to return to the previous page. Otherwise, select "*Delete*" to start from the beginning, or "*Confirm log(s), then return to the top of the logging wizard*" or "*Confirm log(s), then return to the Student selection page*" to complete and save the log for each student.

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: https://paaccess.pcgus.com/documents.html.

Requesting That a Service Log Be Removed

Request Removal via the Student Profile

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
T	08/20/2013	01/10/2015	TMS	9	Wednesday Adams	4813	4813	10 Years	10/31/2005	SLI	
T	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	
T	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

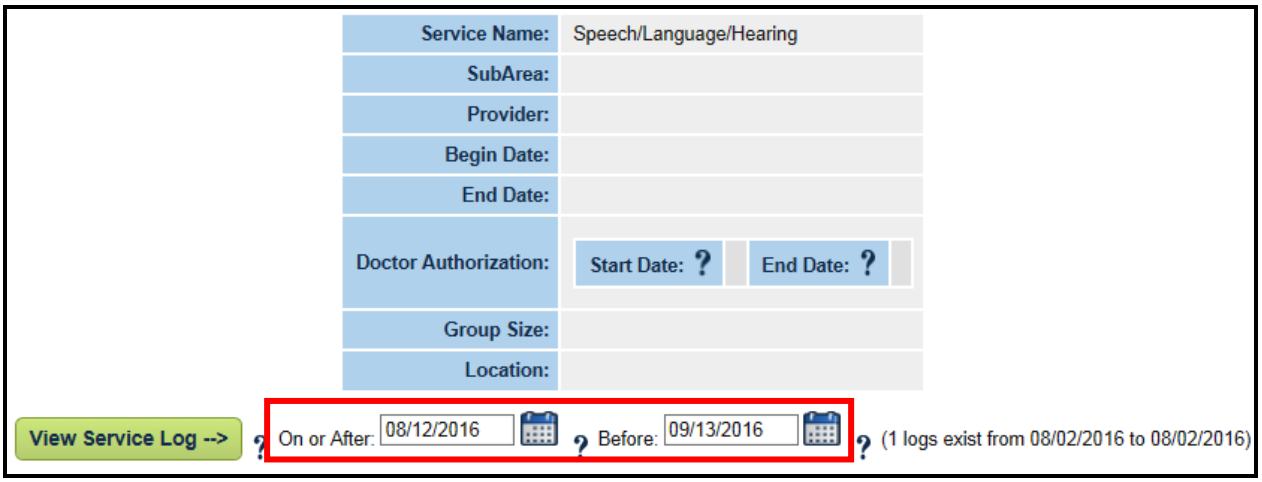
View: Workspace

Related Service	Amount of Service	Consult	ESY	Pct	?	?
Speech/Language/Hearing				0.00	Details	Log
Personal Care Assistant	1 sessions/day of 8 hr			0.00	Details	-----
Special Transportation				0.00	Details	-----
Nursing				0.00	Details	-----
Psychological Evaluation				0.00	Details	-----
Psychology				0.00	Details	-----
Physical Therapy				0.00	Details	-----
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.

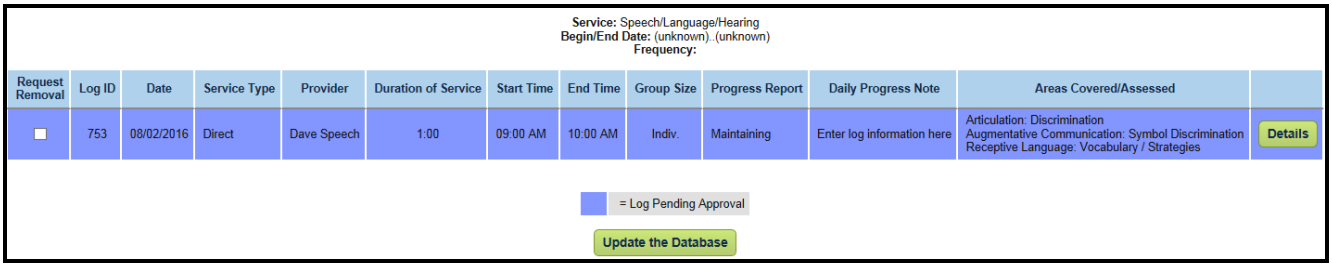
7. Fill in the fields next to the 'On or After' or 'On or Before' dates in the text box

8. Click the 'View Service Log' button

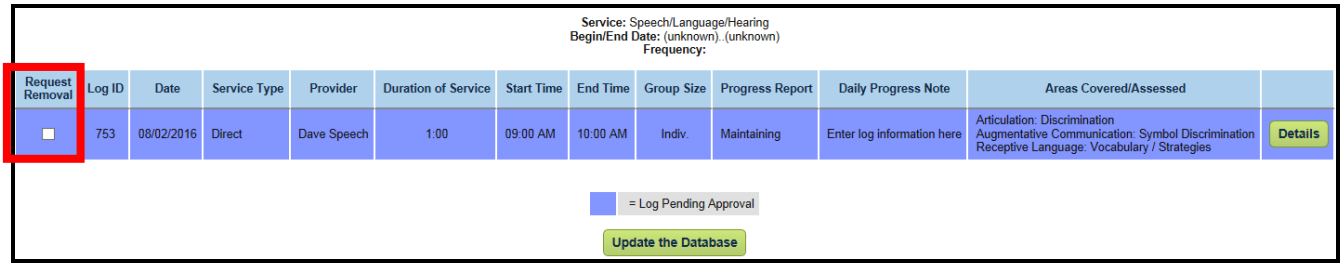


Note: You may only view a service log for a 90-day range. (i.e. If you would like to see a service log for your entire year, you would pull up three service logs, one for each quarter.

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

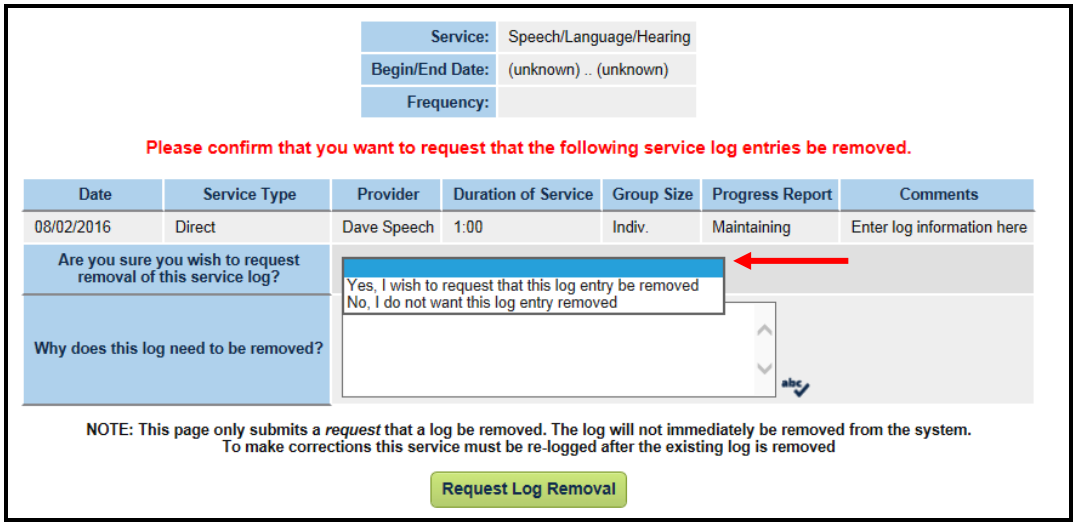


10. Click the box under 'Request Removal' for the log you wish to have removed
11. Click 'Update the Database'



12. 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

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

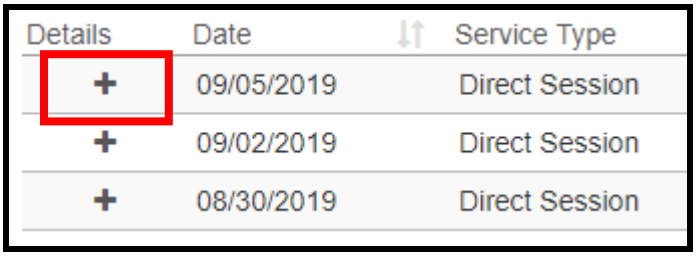


14. After a log has been requested to be removed, viewing the log will display a red X in the 'Request Removal' column, instead of the checkbox. This will remain until the log has been removed from the system.

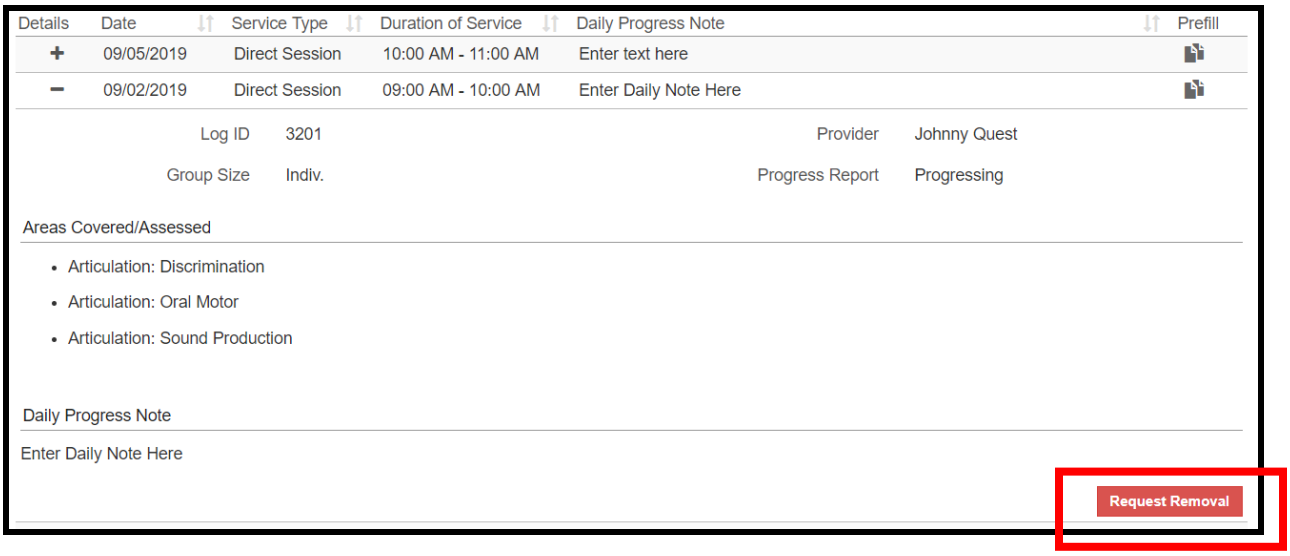
Warning: *If you are requesting deletion for a date of service outside of a cost settled fiscal year, please contact the Bureau of Program Integrity (BPI) at 717-705-6873 or Public Consulting Group (PCG) at 1-888-866-0650 for resolution. Any resulting voids will be processed by DHS.*

Request Removal via the Logging Wizard

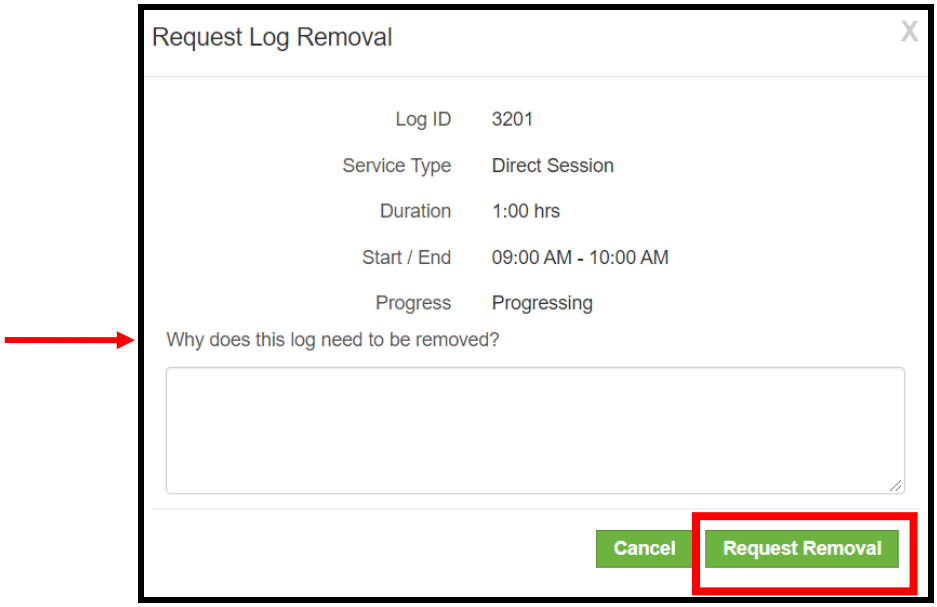
1. Select "Wizards" from the Main Menu
2. Select the Logging Wizard the service log is located under
3. Select the applicable student and select "Launch"
4. Select the "+" button under the Details column in the list of already confirmed logs



5. Select "Request Removal" at the bottom right corner of the log.



6. In the box that pops up, identify the reason the log is being requested for removal and select "Request Removal" to send the request.



Note: The reason for removal is **required**. An error message will appear if this field is left blank. Logs that have been requested for removal are not immediately removed. You will receive notification when the log has been successfully inactivated from the system.

Warning: *If you are requesting deletion for a date of service outside of a cost settled fiscal year, please contact the Bureau of Program Integrity (BPI) at 717-705-6873 or Public Consulting Group (PCG) at 1-888-866-0650 for resolution. Any resulting voids will be processed by DHS.*

DOCUMENTS TAB

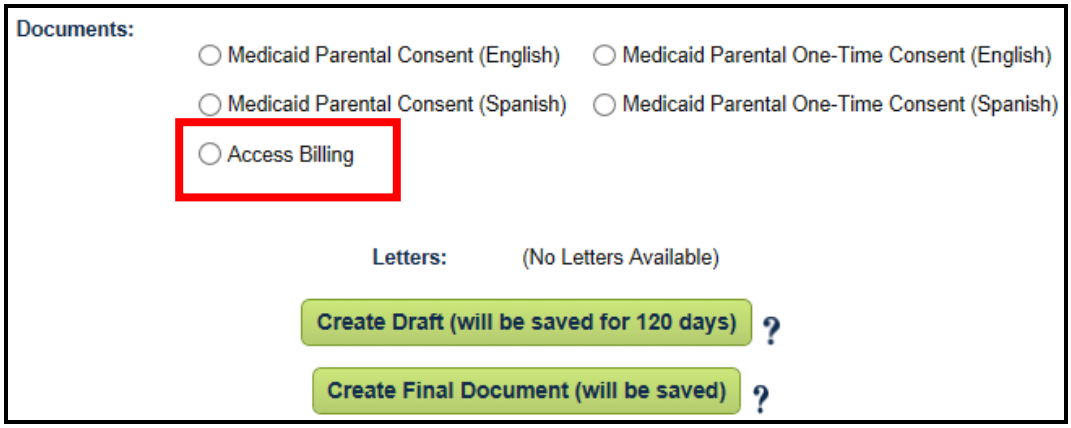
Users can create a document that displays all services logs entered, whether approved or not yet approved. This document can be used for any service provider that needs supervisor sign off.

Completing the Access Billing document

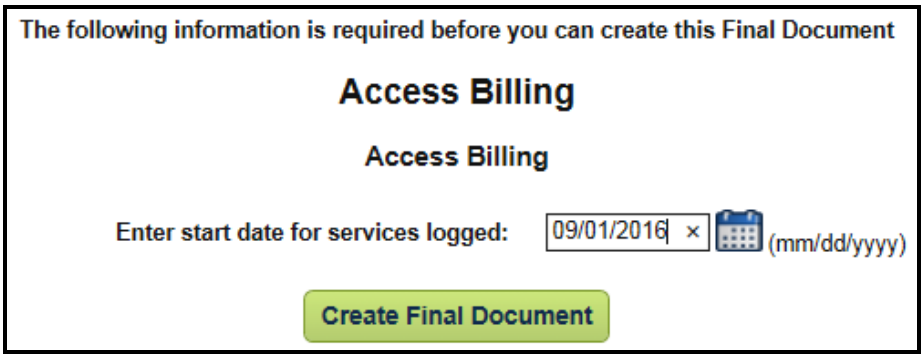
Users can create a document that displays all services logs entered, whether approved or not yet approved. This document can be used for any service provider that needs supervisor sign off.

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**



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.



Note: This printed document can be used when a supervisor signature is REQUIRED. The providers name as it appears in their profile will appear on the Provider Signature line or their uploaded Signature, if applicable.

PA ACCESS Template

Student Name: Dominique Barns
Student ID: TEST9040
Responsible District:
Date of Birth: 06/09/2002
School Address: 555 Test Drive
Location, PA 11234

PA SecureID: 1123343556
Grade: 8th Grade
School Phone:

Service Provider	**School Building**
Amy Test-User	The Test School (7923)

Student Disability	**Service Specialty**
Autism	

Professional Service Log				Progress Indicator					Service Time/Type			
Date	**Signed**	**OBO Svc**	**Areas Covered**	**Prog**	**Main**	**Mast**	**Inc**	**Reg**	**TimeIn - TimeOut**	**H:M**	**Ind**	**Grp**

SIGNATURES

Provider Signature: ATestUser **Title:**_____ **Print Date:** 09/12/2016

Supervisors Signature:*_____ **Title:**_____ **Date:**_____

**Supervisory signature required for applicable certification types*

**This document has been electronically signed

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