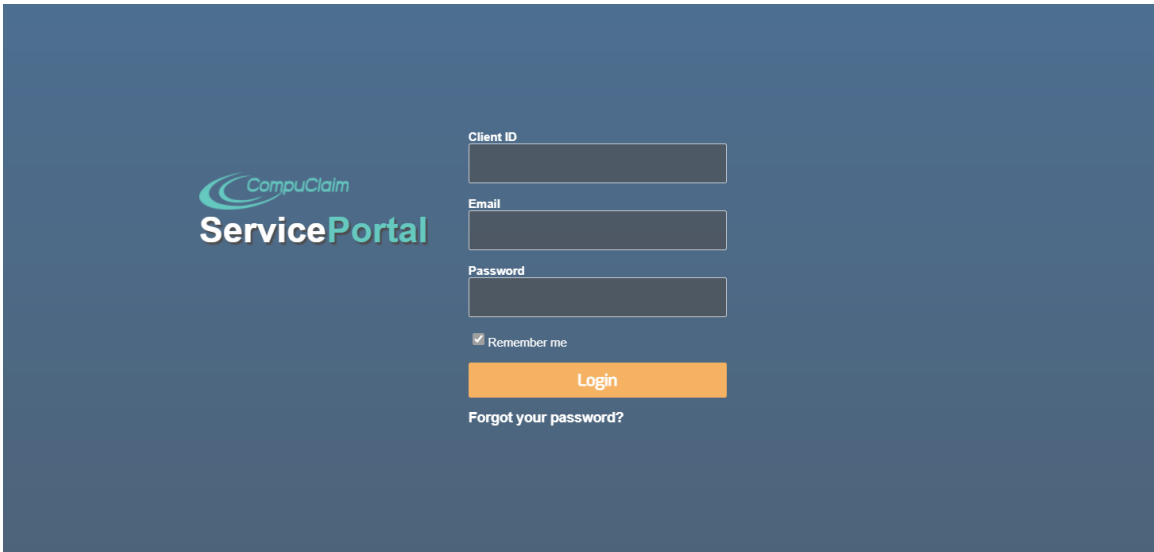


Questions? Please email Lisa Waterman at lwatman@mt-schools.org

Services Portal Handout: Therapists

To access the service portal, log into: <https://serviceportal.compuclaim.com/login.aspx>



The *Client ID* is **Montana**

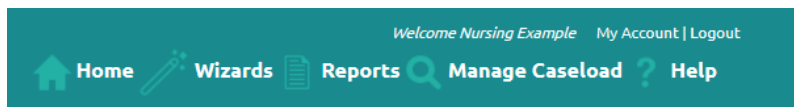
NOTE: *Client ID and Password are Case sensitive.*

Your Initial Password is Welcome22

****TIP** To enlarge the screen hold Ctrl/+, or Ctrl/Shift/+ =**

Navigating the Site

The top right corner displays the Navigational Links available continuously throughout the system.



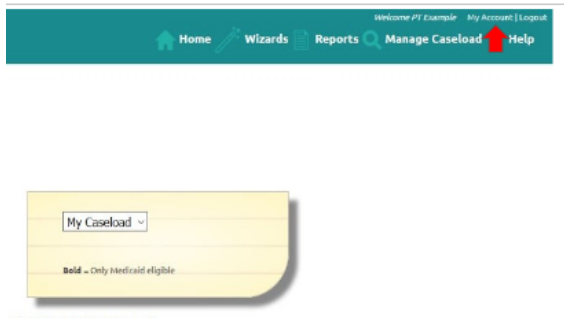
My account – change password

❖ **Home** – Returns to Home page

❖ **Wizards contain links to:**

- **Service Log by Student** – Add and Delete Service Logs. Quarterly Reports and absent day remarks as a NoProc Non-Billable entry

- **Supervision Log** – Logs for approval for those who oversee aides.
- ❖ **Reports** – Can be saved or printed
- ❖ **Manage Caseload** - add/remove students from caseload
- ❖ **Help** – contains videos on how to log services, manage caseload, etc

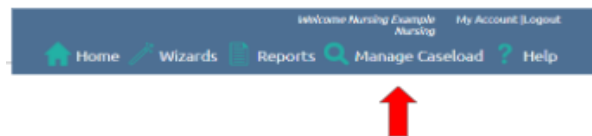


❖❖**TIP**❖❖ **Change your password with your initial visit to the Service Portal**

Choose My Account in the upper right corner of your screen. **Password must be at least 7 characters long, have at least one uppercase letter, at least one lowercase letter, and at least one number.**

Create your Caseload

Before you can log your services, you need to add students to your caseload.



- ❖ Select Manage Caseload in the upper right-hand corner of your screen

Manage Caseload

District: [All] School: [All] Results Per Page: 10 Search: [Enter student's first name here] State's Student ID: [Enter State assigned student's ID] Number of students listed = 13

☐ Only show students on my caseload ☒ Only show active students

	District	State StudentID	Last Name	First Name	Middle Initial	Birthdate	Gender	School	Grade	Active
Add	Not AA District	111111119	Example	Nursing		1/1/2008	Female	Example School	Fourth	True
Add	Not AA District	111111120	Example	Nursing2		1/1/2009	Male	Example School	Third	True
Add	Not AA District	111111121	Example	Orientation/Mobility		1/1/2010	Female	Example School	Second	True
Add	Not AA District	111111113	Example	OT		1/1/2002	Male	Example School	Tenth	True
Add	Not AA District	111111114	Example	OT2		1/1/2003	Female	Example School	Ninth	True
Add	Not AA District	111111122	Example	Personal Care		1/1/2011	Male	Example School	First	True
Add	Not AA District	111111123	Example	Personal Care2		1/1/2012	Female	Example School	Kindergarten	True
Add	Not AA District	111111117	Example	Psyche		1/1/2006	Male	Example School	Sixth	True
Add	Not AA District	111111118	Example	Psyche2		1/1/2007	Male	Example School	Fifth	True
Add	Not AA District	111111115	Example	PT		1/1/2004	Male	Example School	Eighth	True

1 2

Export to Excel

- ❖ Type in a few letters from the last name of a student to find them easily

- ❖ Click the *Add* button

- ❖ There can be multiple pages, so you might need to look on page 2 to find a student

- ❖ To Remove a student from your caseload click *Remove*

- ❖ If you need to remove a student from your caseload, you might need to unselect "Only Show Active Students" next to the student information

❖❖**TIP**❖❖ **If you search for a student and can't find them, you can easily have them added to the system by sending a Student Information Sheet to Lisa at SSoM. A link to this document is available if you choose *Click For Link to Forms and Documents* on your home screen.**



- ❖ Click *Home* in the upper right corner


- ❖ Now your announcement page includes the students on your caseload along with their student ID#

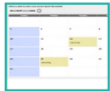
- ❖ Remember to keep your caseload current by adding or removing students using Manage Caseload. Students become not active in the system even when removed from your caseload and are not deleted.
- ❖ **Students that are in Bold are Medicaid eligible, but this can change monthly**

WIZARD: Enter your Services


- ❖ Services are entered through the Wizard
- ❖ Services can be entered individually, part of a group, or for multiple days
- ❖ **Click: Wizards** in the upper right of the home page
- ❖ **Select Service Log by Student Wizard**

Wizards






Service Log by Student Wizard
Use this wizard to enter service logs for students on your caseload.



Edit Student Service Logs
Select pending service logs for editing



Supervision Log Wizard
Use this wizard if you need to complete supervision logs.

as

INDIVIDUAL Service Logging

This is to record a service, non-billable service, or absence.

- ❖ **Select Days you are logging services**
- ❖ Then click Next

Service Log by Student Wizard

Example, Speech (1/1/2000) Prev Next November 2017

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	4
5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input checked="" type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10	11
12	<input type="checkbox"/> 13	<input type="checkbox"/> 14	<input type="checkbox"/> 15	<input type="checkbox"/> 16	<input type="checkbox"/> 17	18
19	<input type="checkbox"/> 20	<input type="checkbox"/> 21	<input type="checkbox"/> 22	<input type="checkbox"/> 23	<input type="checkbox"/> 24	25
26	<input type="checkbox"/> 27	<input type="checkbox"/> 28	<input type="checkbox"/> 29	<input type="checkbox"/> 30		

Prev Next

Enter the Specifics of your Service

Montana **ServicePortal** Home Wizards Re

Service Log by Student Wizard

Example, Speech (1/1/2010)

Add a new service log Prefill from last service log

Service Date* Service Type*

School

Start Time ☒ AM ☐ PM Location

Duration H:MM

Goals And Objectives Manage Goals and Objectives

Saved goals and objectives can be added by selecting the box above. You can also copy and paste goals and objectives from AIM

Comments*

Return to Calendar Save Service Log

- ❖ Date is populated according to your calendar choice, but can be changed
- ❖ The start time is entered with the hour on the left and the minutes on the right
- ❖ *Duration* lists the number of hours on the left, minutes on the right
- ❖ Use the Prefill option at the top to copy the previous Service Log data
- ❖ Required fields display a red asterisk
- ❖ The IEP Program section cannot be populated.

- ❖ You can delete service logs that haven't been billed. If you see a log at the bottom of the screen that you want to delete, click on the trashcan to delete the log. Contact Lisa if you need to change a service that has already been billed
- ❖ Make sure to save your log.
- ❖ The system will time out after 15 minutes and unfinished logs are not saved.

****TIP** You will save a lot of time and typing with the prefill option. The service, start and duration times, and the goals and objectives copy from the previous entry. All you need to do is fill in the comments and save your service!**

Group and Multi-day Service Entry

Group Service Entry:

- ❖ Select the group of children serviced.
- ❖ Click next

Service Log by Student Wizard

Select one or more students to enter service logs for...

Select All Select None

☒ Example, PT : 111111115 ☒ **Example, Speech : 111111111**
☒ Example, PT2 : 111111116

Next >

Service Log

Example, PT (1/1/2004) ▶ ☒ Group Service Prev Next

Sunday	Monday	Tuesday	

****TIP** With a group service, you need to check a box just above the calendar to continue the log as a group session and not an individual session**

- ❖ Select the date of the service
- ❖ Click next
- ❖ You will fill in the information for the first student and the following students will have their logs prefilled with the option add comments that relate to each student
- ❖ Student names will be at the top of each screen while your progress will show as a percentage at the bottom
- ❖ Each service log must be saved!

DATE WHEN
7/17/2017

SCHOOL
Example School

Start Time
10:30 PM ☐ AM ☐ PM

Duration H:MM
0:45

Location
03-School

SERVICE TYPE
92507 Treatment of speech, language, voice, communication - Ind

Duration (min)
Prescribed: 0, Delivered: 0

IEP Program				
IEP Start Date	Service	Service Start Date	Service End Date	Service Frequency
There is no IEP information for this student for this service date				

IEP Goals and Objectives

Goals And Objectives
Goals and Objectives can be copied and pasted from another online file

Comments*
Comments that relate to the group should be added first with unique comments for the individual added.

1 of 3

Return to Calendar

33.33%

Save Service Log

Multi-Day Entry:

- ❖ *This entry method can be used for students with multiple entries in a month. It can also be used to log services for multiple students on multiple days, but this is not recommended.*

- ❖ Select students you wish to log for and then check the desired days on the calendar.
- ❖ All of the required data fields populated will copy exactly to the next log after saving.
- ❖ Once a log is saved it can only be edited under edit service logs or deleted and then re-entered. There is NO back to previous log button.
- ❖ Providers should become familiar with the service portal for individual days before using the multi-day option.

****TIP** When recording group Multi-Day services, the logs are ordered by DATE and then by STUDENT. Record all services on one day before moving on to the next. Take time to look at the dates and names as they change.**

Evaluations:

- ❖ Student IEP evaluations and re-evaluations can only be billed through the Service Portal *once* per year.
- ❖ Keep track of dates and times and combine them in a single entry at completion.
- ❖ Be sure to check the Service Type code you are using to make sure it is correct as they change periodically.

Add a new service log Prefill from last service log

Service Date* 7/26/2017 Service Type* 97167 GO OT eval, high complexity 60 MIN (Effective 1/1/17)

School Example School

Start Time 1:00 PM ☐ AM ☒ Location 03-School

Duration HMM 3:00 Prescribed 0 Delivered 0

Duration (min)

IEP Program

IEP Start Date	Service	Service Start Date	Service End Date	Service Frequency
There is no IEP information for this student for this service date				

IEP Goals and Objectives

Comments* Eval day 7/12 90 min. initial eval
Eval day 7/26 90 min final eval
Details in notes

Progress Reports:

- ❖ Montana Medicaid requires that "Documentation must, at least quarterly, include notes on member progress toward their goals."
- ❖ This report should be added as a non-billable service log for each student.

Reviewing, Correcting, and Deleting Service Logs

Wizards



Service Log by Student Wizard

Use this wizard to enter service logs for students on your caseload.



Edit Student Service Logs

Select pending service logs for editing



Supervision Log Wizard

Use this wizard if you need to complete supervision logs.

- ❖ From the Wizard, select Edit Student Service Logs
- ❖ Type in a few letters of the student's last name to pull up logs in the system
- ❖ Choose the Edit button to review or make changes. The delete button will remove the log and it will not be billed.
- ❖ Claims that are 2 weeks in arrears and earlier are sent in for processing. To make changes to charges that have already been billed, please contact Lisa at lwaterman@swmss.coop

****TIP** You can review all of your logs with the option to edit or delete them by simply hitting the search button without any report parameters. Logs will show from newest to oldest.**

Logging Summary Report

- ❖ From the Home screen, select Reports in the upper right corner.
- ❖ Select **Logging Summary**

- ❖ Define Parameters for student name or date range if desired
- ❖ There is the option to expand the information on log by selecting the + button to the right of the student name
- ❖ This report can be exported into Excel or as a PDF
- ❖ This report is helpful for showing services including dates and comments for a specific student, or for all students for a provider.

Logging Summary For PT Example

Export to PDF Export to XLS

Month: Dates of Service Start Date End Date Student selection
 July 2017 7/1/2017 7/31/2017 [All]

Select Date range from pulldown or enter the date range, make the Student selection and then click 'Run Report'.

Run Report

Rows Returned: 8

Student Name DOB

Type	Service Date	Service	Service Type Desc	Duration	Areas Covered	LC	Comments	Goals And Objectives
Student Name DOB: Example, PT 2004-01-01								
Student Name DOB: Example, PT2 2005-01-01								
Service Log	7/11/2017	Speech & Language w/ CCC	Treatment of speech, language, voice, communication - Grp	45		03	Comments for the group should be listed first and then comments for individual students and days should be second	Goals and Objectives can be copied and pasted from another file
Service Log	7/6/2017	Speech & Language w/ CCC	Treatment of speech, language, voice, communication - Grp	45		03	Comments for the group should be listed first and then comments for individual students and days should be second	Goals and Objectives can be copied and pasted from another file
Student Name DOB: Example, Speech 2000-01-01								

Detailed Student Report

- ❖ Reports can be run showing services for a student
- ❖ Select Reports from the Home Screen
- ❖ Select **Detailed Student Report**
 - Date(s) of service search by monthly drop down or choose a date range.
 - TIP: Always click **Run Report** when parameters are changed.
 - Each student's services are ordered from most recent to oldest.
 - They are grouped by the kind of log. For example, all service logs are together or all days where it was recorded the student was absent are grouped together.
 - There is a page break between students.

Reports

Logging Summary

Detailed Student Report

Monthly Student Log

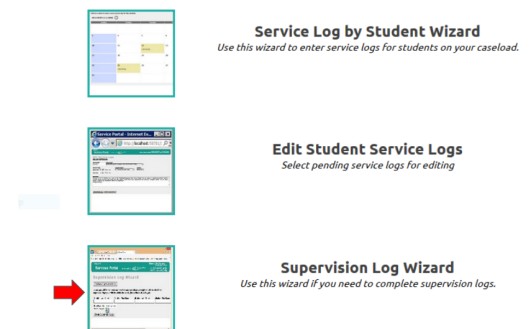
- ❖ Once **Run Report** has been selected there is a navigation bar for the report that has the following functionality from left to right:
 - Print report
 - Print current page
 - Select certain pages for viewing
 - Save file to desktop.
 - **You can hover your mouse over the pictures for instructions**
 - Drop down to choose report format. We provide a variety of options, but PDF tends to work best.

❖ ❖ **TIP** ❖ ❖ **It may be faster to scroll through a large report after it has been saved as a PDF.**

Service Approval / Supervision Logs

- ❖ Service providers can be set up in the portal to have their logs reviewed prior to being submitted.
- ❖ Set up supervisor requirements with an email to Lisa detailing
 - name of the provider needing to have their logs reviewed
 - name of the supervisor
 - beginning and end dates

Wizards



Supervision Log Wizard

Provider: **Speech w/o ccc Example**
Student: **Speech Example (1/1/2000)**

Service Logs	Service Type	Presenting Problem	Service Date	Start Time	Duration	Group Size	Progress Report	Comments	Areas Covered
<input checked="" type="checkbox"/>	Speech/hearing therapy - group		7/17/2017	11:00 AM	15			Specific comments about a students are listed here	
<input checked="" type="checkbox"/>	Speech/hearing therapy - group		7/24/2017	11:00 AM	15			Specific comments about a students are listed here	

Approved Date*

7/25/2017

Comments*

Log is reviewed and accepted. A comment is required in this box

Save and Return to List Save and go to Next Student Save and Continue Skip Summary Return to List

Each service is approved.

- ❖ The supervisor chooses a provider and student. On the next screen the supervisor can then choose one or more services to approve simultaneously.
- ❖ One comment can be entered to be saved with all of the service logs checked on the screen.
- ❖ **CLICK** the Save button at the bottom of the screen.

View Supervision Logs Entered

- ❖ From Supervision Log Wizard **Click: View Previously Entered Supervision Logs.**

❖ **CLICK Search** for all logs to appear or search by provider and/or student.

A supervisor can view previously entered supervision logs and the comment appears within the service log that has been approved. The supervisor can also delete one or more services that he or she may have mistakenly approved.

Supervision Log Wizard

Provider: **Speech w/o ccc Example**
Student: **Speech Example (1/1/2000)**

Service Logs

<input checked="" type="checkbox"/>	Service Type	Presenting Problem	Service Date	Start Time	Duration	Group Size	Progress Report	Comments
<input checked="" type="checkbox"/>	Speech/hearing therapy - group		7/17/2017	11:00 AM	15			Specific comments about a students are listed here
<input checked="" type="checkbox"/>	Speech/hearing therapy - group		7/24/2017	11:00 AM	15			Specific comments about a students are listed here

Approved Date*

7/25/2017

Comments*

Log is reviewed and accepted. A comment is required in this box

Save and Return to List

Save and go to Next Student

Save and Continue

Skip Summary

Return to List

Questions?

Please email Lisa Waterman at lwatman@mt-schools.org