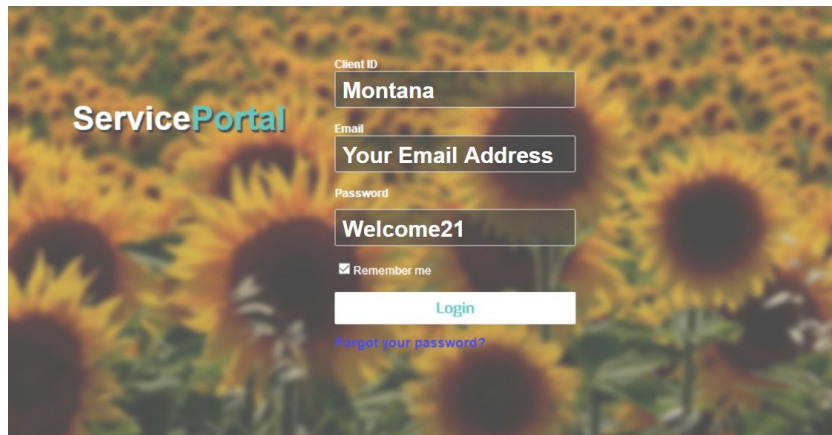


## Personal Care and Nursing Service Portal Instructions

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 Welcome21**

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

### Navigating the Site

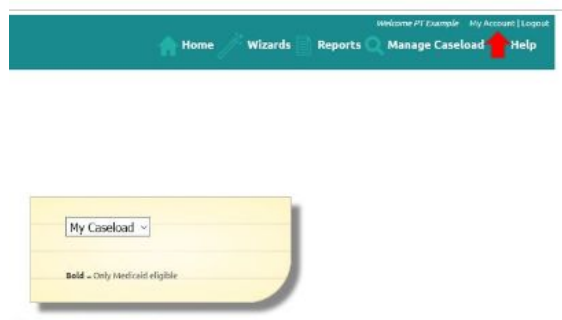
The top right corner displays the Navigational Links available continuously throughout the system.



**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 through 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

**Questions? Please email Lisa Waterman at [lwateman@mt-schools.org](mailto:lwateman@mt-schools.org)**



## \*\*\*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] Number of students listed = 13

Last Name: [Exa] First Name: [Enter student's first name here] State's Student ID: [Enter State assigned student's ID] ☐ Only show students on my caseload ☒ Only show active students

	District	State Student ID	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

Export to Excel

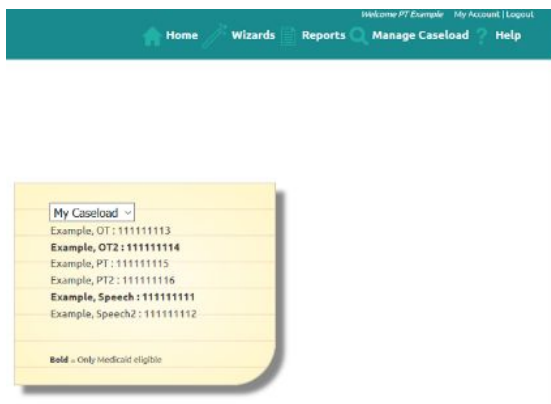
❖ Type in a few letters from the last name of a student to find them easily

❖ 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*

\*\*\*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. 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 remain in the system even when removed from your caseload.
- ❖ Students that are in **Bold** are Medicaid eligible

## Wizards

## WIZARD: Enter your Services

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



**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.



**Nursing Wizard**  
Use this wizard to enter PCA or Nursing logs.

## INDIVIDUAL Service Logging

- ❖ Select Days you are logging services
  - Fill in the duration
  - Select the Areas Covered
  - Select the days
  - Click Log Checked Days
- ❖ The calendar will fill in with the logs
  - Select logs at the bottom of the screen to delete errors
- ❖ After you log checked days, you will be shown the calendar where you can enter more logs for the student.

**Personal Care Attendant/Nursing Wizard**

Example, Personal Care2 (1/1/2012) Duration H:MM 0: 45 School Example School

[Check All](#) | [Check None](#) | [Inverse Selection](#) | 
 [Previous](#) July 2017 [Next](#) | 
 [Personal Care Services](#) | [Log the checked days](#) | [Return to Student Search](#)

**Areas Covered/Assessed\***

☒ Grooming 
 ☒ Exercise 
 ☐ Transfer Assistance 
 ☒ Eating Assistance 
 ☐ Bus time + Escort  
☒ Dressing 
 ☐ Toileting 
 ☐ Ambulation Assistance




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

## Non Billable Logs

- ❖ Use the calendar to log for non-billable entries
  - Choose Non-Billable under the duration time
  - Select Student/Provider Absence or Not Available

**Personal Care Attendant/Nursing Wizard**

Example, Nursing (1/1/2008) Duration H:MM  :  School

[Check All](#) | [Check None](#) | [Inverse Selection](#)     July 2017         

**Areas Covered/Assessed\***

☒ Student Absent   ☐ Student Not Available   ☐ Provider Absent   ☐ Provider Not Available

**\*\*TIP\*\*** Logs can be recorded daily, weekly, or monthly as the provider prefers. Please note that Nursing and Personal Care Logs need to be entered by the 5th of the month for the previous month for claims to be submitted correctly.

## 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. ***If you want to add a comment about a service on a particular day, the Edit function gives you this option.***
- ❖ 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 in the SWMSS office.

**\*\*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**



### Logging Summary For Personal Care 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: 14

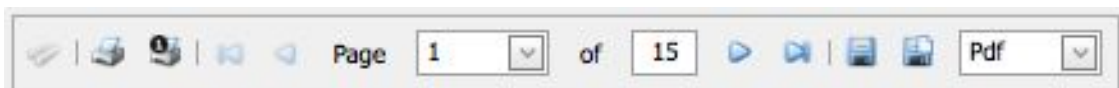
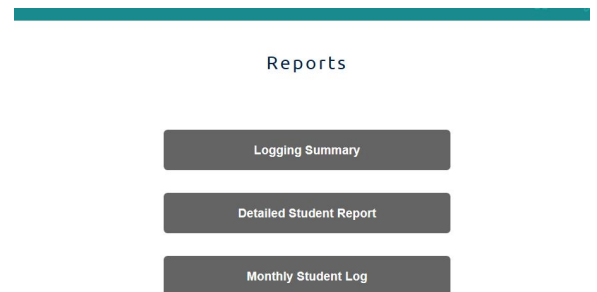
Student Name DOB

Type	Service Date	Service	Service Type Desc	Duration	Areas Covered	LC	Comments	Goals And Objectives
Student Name DOB: Example, Personal Care 2011-01-01								
Student Name DOB: Example, Personal Care2 2012-01-01 (Continued on the next page)								
Service Log	7/26/2017	Personal Care Services	Personal Care Services	45	Grooming, Dressing, Exercise			
Service Log	7/20/2017	Personal Care Services	Personal Care Services	45	Grooming, Dressing, Exercise			
Service Log	7/19/2017	Personal Care Services	Personal Care Services	45	Grooming, Dressing, Exercise	03	Comments can be added to a service date using Edit Service Logs from the Wizard	

- ❖ Define Parameters for student name or date range if desired
- ❖ There is the option to expand the information on a log by selecting the + button to the right of the student name
- ❖ Data 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.

## 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.



- ❖ 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 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

### Wizards

- ❖ 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



**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.

### Supervision Log Wizard

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

Service Logs									
<input type="checkbox"/>	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

### 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 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