Administrator Training

Training Date: ________________________________

Trainer: ______________________________________

Questions & Support: Send an Email Through the Message Board Link on Main Menu
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>WHO IS PUBLIC CONSULTING GROUP (PCG)</td>
<td>3</td>
</tr>
<tr>
<td>EASYTRAC GENERAL INFORMATION</td>
<td>4</td>
</tr>
<tr>
<td>MESSAGE BOARD</td>
<td>6</td>
</tr>
<tr>
<td>MESSAGE OF THE DAY</td>
<td>7</td>
</tr>
<tr>
<td>UPLOADED FILES</td>
<td>8</td>
</tr>
<tr>
<td>CHANGING PASSWORDS</td>
<td>8</td>
</tr>
<tr>
<td>MANAGING SCHOOLS</td>
<td>9</td>
</tr>
<tr>
<td>MANAGING USERS</td>
<td>10</td>
</tr>
<tr>
<td>MANAGING STUDENTS</td>
<td>13</td>
</tr>
<tr>
<td>POPULATE OR VERIFY “PA SECURE ID”</td>
<td>13</td>
</tr>
<tr>
<td>PARENTAL CONSENT</td>
<td>14</td>
</tr>
<tr>
<td>VERIFYING PARENTAL CONSENT HAS BEEN OBTAINED</td>
<td>15</td>
</tr>
<tr>
<td>THE PARENTAL CONSENT DATES ARE REQUIRED FIELDS</td>
<td>15</td>
</tr>
<tr>
<td>IEP BEGIN AND END DATES</td>
<td>16</td>
</tr>
<tr>
<td>RELATED SERVICES</td>
<td>17</td>
</tr>
<tr>
<td>PHYSICIAN AUTHORIZATION</td>
<td>18</td>
</tr>
<tr>
<td>MANAGING CASELOADS</td>
<td>20</td>
</tr>
<tr>
<td>USING THE CASELOAD ADMINISTRATION WIZARD</td>
<td>20</td>
</tr>
<tr>
<td>REMOVING A STUDENT FROM A USER’S CASELOAD</td>
<td>21</td>
</tr>
<tr>
<td>“ON BEHALF OF” FUNCTION</td>
<td>22</td>
</tr>
<tr>
<td>DOCUMENTING SERVICES</td>
<td>23</td>
</tr>
<tr>
<td>PRINTING THE SERVICE LOG HISTORY</td>
<td>28</td>
</tr>
<tr>
<td>REQUESTING THAT A SERVICE LOG BE REMOVED</td>
<td>30</td>
</tr>
<tr>
<td>SERVICE LOG APPROVAL</td>
<td>31</td>
</tr>
<tr>
<td>SETTING UP THE APPROVAL FEATURE</td>
<td>31</td>
</tr>
<tr>
<td>USING THE SERVICE LOG APPROVAL WIZARD</td>
<td>33</td>
</tr>
<tr>
<td>DOCUMENTS TAB</td>
<td>344</td>
</tr>
<tr>
<td>REPORTS IN EASYTRAC™</td>
<td>346</td>
</tr>
<tr>
<td>LOGGING OUT OF EASYTRAC™</td>
<td>348</td>
</tr>
</tbody>
</table>
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 EDUCATION

PCG Education 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.
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 is 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 desk top. You will then login to the EasyTRAC™ site.

   ![My URL is:](https://go12.pcgeducation.com/_______________________________)

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__________________.

![EasyTRAC™ PA ACCESS](image)

**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. Click ‘Send us a Message’.
2. Select which type of message you would like from the ‘Message Type’ drop down box.
3. Type the subject of your message in the ‘Subject’ box. Be as specific as possible.
4. 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.
5. Add your message to the text box.
6. Click once on the ‘Send Message’ button.

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

Bug Report: Use this link when a feature or function of EasyTRAC™ is not working correctly.

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, the ‘New Mail’ link will appear on your Main Menu next to the Message Board message options.
To access your new message, you can do one of the following:

1. Click on ‘New Mail’
2. Click on the ‘My Messages’ Link

Choosing either of these links will direct users to the following screen, which displays New Messages, as well as stores a user’s Previous Messages.

Once you have read all new messages, you will no longer see the ‘New Mail’ icon on your Main Menu screen.

**Message of the Day**

Below the Message Board you will find the Message of the Day. This message is edited by your district’s administrators and will alert you of any important information. Please check this message often to stay informed with district-wide changes or updates.
Files Available Online for Viewing/Printing

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 login 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.

To change your password:

1. From the Main Menu – Click on the ‘My Info’ tab.
2. Enter your current password at the top of the screen.
3. Type your new password in both the ‘New Password’ and ‘New Password (to verify)’ fields.
4. Click the ‘Update the Database’ button.

After updating the database, a confirmation box will display. 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 system 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. Please ensure that your e-mail address and phone number are correct.
MANAGING SCHOOLS

Adding Schools to EasyTRAC™

1. Click the ‘Schools’ tab at the top of the Main Menu screen
2. Click ‘Add new school’

3. Complete the required information and click ‘Update the Database’

**Note:** All students in Early Intervention will need to be assigned to an EI specific school. As the students age-out of Early Intervention, they will need to be moved to a new school in EasyTRAC™.

Removing Schools from EasyTRAC™

1. Click on the ‘Schools’ tab at the top of the Main Menu screen
2. Click the name of the school you wish to remove
3. Click ‘Delete this school from the database’

**Note:** All students must first be re-assigned before you may delete their school.
MANAGING USERS

Adding Users to EasyTRAC™

1. Click on the ‘Users’ tab at the top of the Main Menu
2. Click ‘Add New User’
3. Complete the fields at the top of the page. Note that EasyTRAC™ does not require the user’s address information. However, your district may choose to capture this information.

**Note:** Each user must be assigned a User Type. This is a level of permission associated with that user’s role. The “Related Service Provider” user type is generally acceptable for all clinicians and therapists. A user type is required prior to a user having the ability to login to the system.

Each user imported will be assigned automatically to the “Unassigned” user type. This must be updated prior to a user logging into the system.

![Add New User](image)

**Note:** Users are automatically added to all schools in the system. There is no need to select which schools the user is responsible for.

4. Select those services the user should have access to provide by checking the ‘Can Provide’ checkbox.
   a. ALL service providers MUST have certification/license information saved in the system. Click the ‘Certified’ checkbox and also populate the certification information.
   b. **It is important NOT to select ‘Approver/Supervisor’ unless this user should have the ability to APPROVE this type of service.** Generally, only ACCESS Coordinators or Special Education Admins should have the ‘Approver/Supervisor’ check box checked.

**Note:** See pages 31-32 of this manual for direction on how to make a user/administrator an approver in the system.
5. Scroll to the bottom of the screen and click ‘Add User to Database’

**Editing User Information in EasyTRAC™ (Resetting Passwords)**

1. Click on the ‘Users’ tab at the top of the Main Menu screen
2. Search for the user that you wish to edit
3. Click the user’s name
4. Scroll to the field you wish to edit and make the change
5. Scroll to the bottom of the screen and click ‘Update the Database’

**Removing Users from EasyTRAC™**

1. Click on the ‘Users’ tab at the top of the Main Menu screen
2. Search for the user that you wish to edit
3. Click the user’s name
4. Scroll to the bottom of the page and click ‘Delete this user from the database’
MANAGING STUDENTS

Adding Students to EasyTRAC™

1. Click on the ‘Students’ tab at the top of the Main Menu screen
2. At the bottom of the screen, select the school from the drop down box then click ‘Add new student to’

3. Enter the student’s demographic information

Populate the ‘PA Secure ID #’ field

Note: This is a REQUIRED field in Medicaid claiming. Services will not be submitted for reimbursement without this ID number in-place.

1. Click on the ‘Students’ tab at the top of the Main Menu screen
2. Search for the student
3. Click on a student’s name; this brings you to the Personal Information page
4. Populate the PA Secure ID field.
5. Scroll to the bottom of the page, and click ‘Update the Database’
Removing Students from EasyTRAC™

1. Click on the ‘Students’ tab at the top of the Main Menu
2. Search for the student that you wish to remove and click on their name
3. Scroll to the bottom of the page and click ‘Make this student inactive’ Click on the ‘Students’ tab at the top of the Main Menu screen
4. Search for the student
5. Click on a student’s name; this brings you to the Personal Information page

--- Parental Consent to bill for Medicaid Services ---

Signature Date: ____________________________ Begin Date: ____________________________ End Date: ____________________________

Update the Database

Make this student inactive

PARENTAL CONSENT

Verifying Parental Consent has been obtained

The Parental Consent dates are REQUIRED for Medicaid claiming. Services will not be submitted for reimbursement without this field being populated.

1. Click on the ‘Students’ tab at the top of the Main Menu screen.
2. Search for the student

3. Click on a student’s name
4. Scroll to the bottom of the page to Parental Consent to bill for Medicaid Services.
5. Enter the Signature Date, Begin Date and the End Date, this will allow for Medicaid billing for services
Note: If a parent does not give consent for Medicaid billing during the next IEP meeting, you must enter the date the parent was notified and refused to give consent; this will prevent Medicaid billing from occurring for services after that date. This is entered in the Parental Consent to Bill for Medicaid Services confirmation screen when entering in new dates.

Note: There has been a lot of misinformation about Parental Consent in the last few years. Parents may need clarification and assurance that school therapy will not impact private therapy.

A blank Parental consent form in Spanish and in English 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.

A copy of the signed Parental Consent form should be kept with the student’s file; the original should be sent to your district coordinator.
Current IEP DATE

Verifying that the Current IEP Date has been entered

The Current IEP date is REQUIRED for Medicaid claiming. Services will not be submitted for reimbursement without this field being populated.

1. Click on the ‘Students’ tab at the Main Menu screen
2. Search for the student
3. Click on a student’s name
4. Click the ‘Special Education Eligibility’ tab at the top of the Personal Information for \___ screen
5. Enter the “Primary Disability” and “Begin Date” of the current IEP.
6. Click ‘Update the Database’
7. Confirm that the “IEP Meeting Date” and “End Dates” are correct by checking the box to the left of the “IEP Meeting Date”
8. Click ‘Update the Database’
RELATED SERVICES

Adding Related Services

1. Click on the ‘Students’ tab at the top of the Main Menu screen
2. Search for the student
3. Click on a student’s name.
4. Click the ‘Related Services’ tab at the top of the Personal Information for _____ screen
5. Click ‘Add Related Services’

6. Select the services that need to be added from the dropdown list

*Note: The Frequency, Duration and Location fields ARE NOT required*

7. Click ‘Update the Database’
PHYSICIAN AUTHORIZATION

The “Doctor Authorization Begin” and “End” date fields are REQUIRED for Medicaid claiming. Services will not be submitted for reimbursement without these fields being populated.

1. Click on the ‘Students’ tab at the top of the Main Menu screen
2. Search for the student
3. Click on a student’s name.
4. Click the ‘Related Services’ menu button
5. Click ‘Details’ for the service you wish to enter Physician Authorization dates

6. Enter the Begin and End dates and then click ‘Update the Database’

ENTERING ADDITIONAL DOCTOR AUTHORIZATIONS

The “Doctor Authorization Begin” and “End” date fields are REQUIRED for Medicaid claiming. Services will not be submitted for reimbursement without these fields being populated.

AT THIS TIME, if you UPDATE the “Doctor Authorization Begin” and/or “End” date fields, the previous date will be OVERWRITTEN. You MUST add an additional Related Service in order to capture an updated Doctor Authorization. In order to capture additional Doctor Authorization Begin and End dates, follow the below steps:

1. Click on the ‘Students’ tab at the top of the Main Menu screen
2. Search for the student
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. Click on the ‘Add Related Service’
6. Select the service that needs to be added from the dropdown list
7. Click ‘Update the Database’
8. Click the ‘Details’ button of the newly entered Related Service
9. Enter the newly attained Doctor Authorization dates

Note: This will cause the student to be listed twice (or more times) on the provider’s Logging Wizard screen. This has caused some confusion when logging services.

In order to avoid confusion, populate the “SubArea” field in the Related Service Details screen.

![Image of Related Services Details](image_url)
MANAGING CASELOADS

Using the Caseload Administration Wizard

1. Click the ‘Wizards’ tab from the Main Menu screen
2. Click the ‘Caseload Administration Wizard’ link.

   ![Available Wizards]
   
   - Speech/Language/Hearing Logging Wizard
   - Speech/Language/Hearing Group Logging Wizard
   - Service Log Approval Wizard
   - Caseload Setup Wizard
   - **Caseload Administration Wizard**

3. Search for the user for whom you would like to manage. For best results, first try to search by last name
4. Click on the user’s name
5. To add students, search for the student(s) you would like to add to the user’s caseload. For the best results, keep the search as broad as possible, usually by school.
6. Click on the ‘View Students’ button.

   ![Caseload Setup Wizard - Search for students to add to caseload of Adam Clinician]

   7. Check the ‘Team Member’ check box next to the student(s) you would like to add to your caseload
   8. If the type of service that the user provides has not been added to the student’s Related Service table, it can be added by clicking on that service on the right side of the screen (i.e. Speech, OT, etc).
   9. Click ‘Add Students to Caseload’
Removing a Student from a User’s Caseload

1. Uncheck the *Team Member* checkbox next to the student(s) you would like to remove
2. Click the ‘Update the Database’ button – this will remove all of the students you selected

<table>
<thead>
<tr>
<th>Case Manager</th>
<th>Team Member</th>
<th>Student</th>
<th>School</th>
<th>Grade</th>
<th>DOB</th>
<th>Case Manager</th>
<th>Services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>resize</td>
<td>Wednesday</td>
<td>MES</td>
<td></td>
<td>10/31/2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Adams</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Jessica</td>
<td>JHS</td>
<td></td>
<td>08/02/2010</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Hiba</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
“ON BEHALF OF” FUNCTION

Using the “on behalf of” function
To begin documenting services for another provider, you will need to select the “on behalf of” icon next to the user’s name for whom you want to log services.

How to Use the “On Behalf Of” Function

1. Click on the ‘Users’ tab at the top of the Main Menu
2. Search for the user for whom you want to log services
3. Click on the user’s name
4. Click the “On Behalf Of” icon to the left of the user’s name

5. A confirmation page will display, click the “I Agree” button
6. All activity will be viewed and recorded as you, but acting on behalf of the user

Note: The “On Behalf Of Permission Agreement” form needs to be filled out and returned to PCG in order to access this functionality.
DOCUMENTING SERVICES

Using the Logging Wizard

To begin documenting services, students must be added to the provider’s caseload. Once the students are added (and after you have activated the On Behalf Of functionality), you will use the Service Logging Wizard. Please see the “Managing Caseloads” section for more details.

How to Document a Service Using the Logging Wizard

1. Click on the ‘Wizards’ tab
2. Click the Logging Wizard for the service that you wish to log
3. Check the boxes for the students for whom you wish to document services
4. Click ‘Continue.’

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

*Note:* The student’s name is listed in **Bold-Blue** 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.
Note: When a log is highlighted in teal, this means that the log still needs to be confirmed. If the user needs to delete the log, click the trashcan next to the newly added log. The log will need to be re-entered.

6. Complete the data fields for the service provided, and click ‘Add to table’ to add the service documentation to the above table.
7. You may document additional services and click ‘Add to table’ prior to confirming and saving the services.
8. 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.

Notice the ‘Prefill’ button. Clicking on this button will prefill the typical service information 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.

**Documenting Group Services**

1. Click on the ‘Wizards’ tab from the Main Menu screen.
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.
5. On this page, select the specific Progress Report, enter Description of Service and select the appropriate Areas Covered/Assessed for each student, then click ‘Update the Database’

6. Review the services for each student and at the bottom of the page, you have four options:
   - ‘No, edit these log entries’
   - ‘Yes, log these services’
   - ‘Yes, log these services, then allow me to log another group service’ OR
   - ‘No, I wish to abort this entry’

**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.

Printing the Service Log History

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

2. Search for the student
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
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

![Related Services Details](image)

**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

![Service Log](image)

10. Select File from your browser tool bar
11. Select Print Preview
12. Select Landscape for the print orientation
13. Select a print size that is appropriate for you (tests have found the shrink to 80% option works best for printing)
14. Click the Print icon
Requesting That a Service Log Be Removed

1. Follow the instructions listed in the To View the Services Log History section to view your service log for a student.
2. Click the check box for ‘Request Removal’ for the log you wish to have removed.
3. Click ‘Update the Database’
4. After clicking ‘Update the Database,’ the following will appear.
5. In the drop-down box marked “Are you sure you wish to request removal of this service log?” choose ‘Yes’ to have the log deleted.
6. Type your reasons for deleting the log in the text box and click on ‘Request Log Removal’
7. 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 deleted.
SERVICE LOG APPROVAL

Setting up the Approval Feature

1. Click the ‘Users’ tab from the Main Menu
2. Search for the user who will be the approver and click their name
3. Scroll to the Service Certifications section
4. Check the ‘Can Provide’ checkbox for each service that this user will be responsible for approving
5. Click ‘Update the Database’
6. Scroll back down and check the ‘Approver/Supervisor’ checkbox for each service that this user will be responsible for approving
7. Click ‘Update the Database’

<table>
<thead>
<tr>
<th>Service Certifications</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Related Services</strong></td>
</tr>
<tr>
<td><strong>Services</strong></td>
</tr>
<tr>
<td>Audiology</td>
</tr>
<tr>
<td>EI-Audiology</td>
</tr>
<tr>
<td>E&amp;I Meeting</td>
</tr>
<tr>
<td>EI-Nursing</td>
</tr>
<tr>
<td>EI-Occupational Therapy</td>
</tr>
<tr>
<td>EI-Orientation and Mobility</td>
</tr>
</tbody>
</table>

8. This user will now have an Approval Wizard on the ‘Wizards’ tab.
Designate users to be approved (ex., Speech Therapists, OTs, PTs)

1. Click the ‘Users’ tab from the Main Menu
2. Search for the user for whom you will be designating an approver
3. Click their name
4. Scroll to the Related Services section
5. Check the ‘Can Provide’ checkbox for each service that this user will be responsible providing
6. Click ‘Update the Database’
7. Scroll back down and click the ‘Manage Supervisors’ button

8. Select the appropriate approver in the “Overall Supervisor” field

9. Click ‘Update the Database’

Note: You MAY select multiple approvers based on the school, but only one approver can approve any one log. Once the log is approved by one approver, it can no longer be approved by the other approver.
Using the Service Log Approval Wizard

1. Click the ‘Wizards’ tab from the Main Menu
2. Click the ‘Service Log Approval Wizard’ link

3. Click the check box for the user whose logs you wish to approve and click “Continue”

4. To approve the service, click the check box in the ‘Approve’ column. Alternatively, you could click ‘Check All’ to approve all logs.
5. Scroll to the bottom and click ‘Approve the Selected Service Logs’

6. The last page in the process displays the logs that were just approved. From here, you can click on ‘Return to the Wizards Page’ or click on the Main Menu button at the top of the page
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.

Printing the Access Billing document for supervisor signature

1. Click the ‘Students’ tab from the Main Menu
2. Search for the student
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. The user can complete this document in both a draft format and a final format. The draft will display a “Proposed” watermark on the top of the page.

Note: This printed document can be used when a supervisor signature is REQUIRED (COTA, PCA and certain Audiologist & Speech/Language/Hearing service logs)
**Student Name:** Suri Carlson  
**Student ID:** 2304980  
**Date of Birth:** 07/26/2012  
**School Address:** 100 Test St  
Test, PA 55555  
**PA SecureID:** 4569871  
**Grade:** 7th Grade  
**School Phone:** (555) 555-1212

<table>
<thead>
<tr>
<th>Service Provider</th>
<th>School Building</th>
<th>Student Disability</th>
<th>Service Specialty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thomas Brady</td>
<td>Sample School (SAMPLE)</td>
<td>Developmental Delay (3-5 in EI Program)</td>
<td>Personal Care Assistant</td>
</tr>
</tbody>
</table>

---

**Professional Service Log**

<table>
<thead>
<tr>
<th>Date</th>
<th>Dir</th>
<th>Coll</th>
<th>Activities/Procedures</th>
<th>Prog</th>
<th>Main</th>
<th>Mast</th>
<th>Inc</th>
<th>Reg</th>
<th>TimeIn</th>
<th>TimeOut</th>
<th>HM</th>
<th>Ind</th>
<th>Grp</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/13/2012</td>
<td>X</td>
<td></td>
<td>• Accompanying students on school buses or other vehicles. A PCA's presence is necessary because of a student's physical disability or mental health disability.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>03:15 PM</td>
<td>03:25 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Comments:** Assist to school bus and help up the steps due to physical needs.

---

**SIGNATURES**

Provider Signature: ____________________________  Title: ____________________________  Date: ____________

Supervisors Signature*: ____________________________  Title: ____________________________  Date: ____________  

*Supervisory signature is required when services are provided by paraprofessionals.
REPORTS IN EasyTRAC™

Administrators have access to several reports in EasyTrac™

1. Click ‘Reports/School System’ from the Main Menu

2. Select the report you wish to create

- **Service Log Report (xls)** – This report can be generated to show various details of service logs that have already been entered into EasyTrac, such as:
  - Approved and Unapproved logs
  - Total Time of any related service (to ensure that a student is not receiving more than what is stated in the IEP)
  - Determining which students received services on which day in order to log Special Transportation

- **Deleted Log Report** – This report can be generated to show which service logs have been deleted from the system
User Information – This report can be generated to show various user details, such as:
- User Type
- User ID
- Certification Information
- Number of students on caseload

Provider Caseload Report – This report can be generated to show the student ID of all students on your providers’ caseloads. It also shows the total number of logs (and total time) submitted for each student, by month.

Medicaid Eligibility and Parental Consent Report – This report displays the current Medicaid Eligibility Status for all students THAT HAVE BEEN ENTERED INTO EASYTRAC.
- Only students with a “Y” in column I – Medicaid Eligible are CURRENTLY eligible

Services Report – This report displays the Related Services that have been entered on the students’ Related Services table. This report DOES NOT display individual service logs.

Active Student Extract – This report will display any student specific information that has been entered on the student’s Personal Information screen. When generating this report, the only qualifier that needs to be changed is the “Eligibility” field, change the drop down to “ALL”.

Once this report is generated, it will display in a text format (columns may not line up correctly). In order to view the report in a clean format:
1. Open Microsoft Excel and create a new, blank spreadsheet
2. Highlight all cells
3. Right click anywhere in the spreadsheet
4. Select “Format Cells”
5. Select “Text” on the ‘Numbers’ tab (this is VERY important b/c Excel will, by default, drop any leading zeros from any numbers)
6. Click “OK”
7. Copy the entire report
8. Paste it into your newly formatted Excel file
9. Right click on your spreadsheet and select “Paste Special”
10. Click the radio button to the left of “Text”
11. Click “OK”
LOGGING OUT OF EasyTRAC™

To log out of EasyTRAC™:
1. Click the “Log Out” tab at the left 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.**