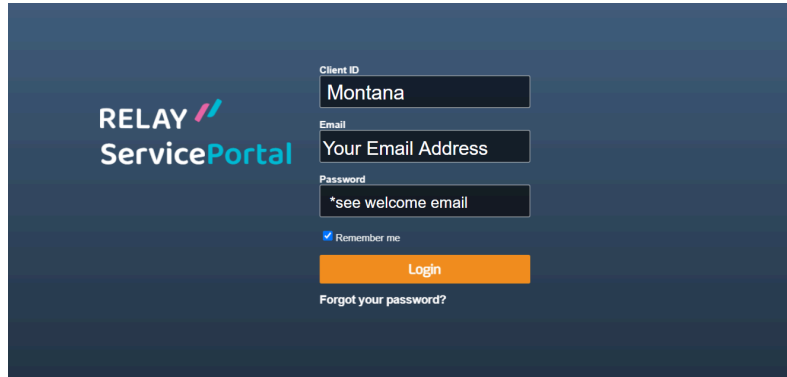


Service Portal Handout: Therapists

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



The *Client ID* is **Montana**

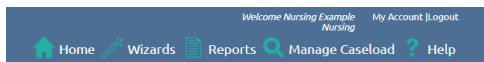
NOTE: *Client ID and Password are Case sensitive.*

Your Initial Password is provided in your welcome email

**** 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 – To change your password

Home – Returns to Home page

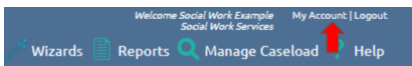
Wizards contain links to:

- **Service Log by Student** – Add and delete service logs. Quarterly reports and absence days are added in the service log by student wizard
- **Supervision Log** – Logs for approval for those who oversee aides.

Reports – Can be saved or printed

Manage Caseload - Add and remove students from caseload as needed

Help – Contains videos on how to log services, manage caseload, etc



**** TIP ** Change your password the first time you log in**

– Choose My Account in the upper right corner of your screen.

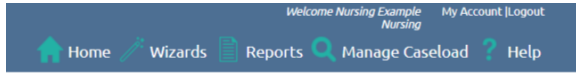
– **Passwords must be at least 7 characters long, have at least one uppercase letter, lowercase letter, and number.**



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

Create your Caseload

Before a service can be logged, students need to be added to a caseload.



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

Manage Caseload

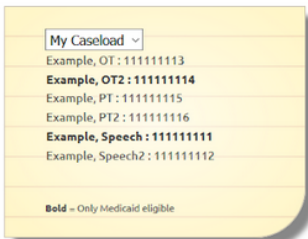
	District	State Student ID	Last Name	First Name	Middle Initial	Birthdate	Gender	School	Grade	Active
Add	Not AA District	111111119	Example	Nursing		1/1/2008	Female	Example School	Fourth	True
Add	Not AA District	111111120	Example	Nursing2		1/1/2009	Male	Example School	Third	True
Add	Not AA District	111111121	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

- Type in a few letters from the last name of a student to find them easily
- Click the *Add* button next to the student name
- 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 select the *Remove* button next to the student name

*To remove an inactive student from your caseload, **unselect** "Only Show Active Students" next to the student information. Please email Lisa at School Services of Montana the initials of students that leave the district or exit IEP services after you remove them from your caseload. lwaterman@mt-schools.org

**** TIP **** If you search for a student and can't find them, you can easily add them 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.

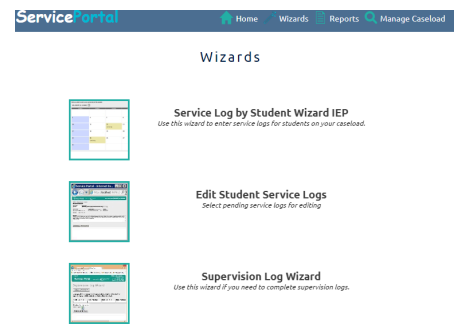
Home Screen and Announcements Page



- Select *Home* in the upper right corner of your screen
- The announcement page includes the students on your caseload along with the state published student ID# for that student.
- Keep your caseload current by adding or removing students using Manage Caseload. Students and their service log information are never fully deleted from the system.
- **Students that are in Bold are Medicaid eligible. Eligibility can change!**

WIZARD: Enter your Services

- ❖ Services are entered through the Wizard tab.
- ❖ Logs can be entered individually, as part of a group, and for multiple days.
- ❖ Select the Wizard tab from the upper right of the home screen.
- ❖ Service Log by Student Wizard to enter service logs.



Service Log by Student Wizard

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

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

Prev Next

INDIVIDUAL Service Logs

To record a service or non-billable log

- ❖ Choose the day to log services on the calendar.
- ❖ Select *Next* at the bottom of the page.

Enter the Specifics of your Service

- Date is populated according to your calendar choice, but can be changed in the service log page.
- The *Start Time* and duration are entered with the hour on the left and the minutes on the right.
- Goals and Objectives come from the student IEP.
- Goals and Objectives can be saved separately for each student. The forms tab on the home screen of the portal provide additional directions for this option or contact Lisa for more information.
- A service type and comment are required for each service.
- If there is a log at the bottom of the screen that should be deleted, click on the trashcan on the left to delete the log.
- Make sure to save the log before exiting the screen. The system will time out after 15 minutes and unfinished logs are not saved.

****TIP** 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.**

Montana Service Portal Home Wizards Reports Ma

Service Log by Student Wizard

Example, Speech (1/1/2010)

Add a new service log Prefill from last service log

Service Date* 12/12/2022 Service Type* 92507 Treatment of speech, language, voice, communication - Ind

School Example School

Start Time 10:00 AM AM PM Location 03-School

Duration H:MM 0:25

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 the AIM system.

Comments* Comments are required. A SOAP note or similar explanation for the service is added here. These notes should be complete in case the service is audited.

Return to Calendar Save Service Log

Group and Multi-day Service Entry

Group Service Entry:

- ❖ Select the group of children serviced.
- ❖ OR create a group in advance and choose the group from this screen.
- ❖ 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

Sunday	Monday	Tuesday

****TIP** With a group service, 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
- ❖ Select next at the bottom of the screen
- ❖ Fill in the information for the first student. The students that follow will have their logs prefilled
- ❖ 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!

Service Date* 12/1/2022 Service Type* 92507 Treatment of speech, language, voice, communication - Ind

School Example School

Start Time 10:30 AM AM PM Location 03-School

Duration H:MM 0:25

Goals And Objectives

Saved goals and objectives can be added by selecting the box above. You can also cut and paste goals and objectives from the AIN system.

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

1 of 3 88.88%

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.
- ❖ Select students 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 the previous log button.
- ❖ Providers should become familiar with logging 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 can only be billed through the Service Portal *once* per year per service type.
- ❖ Keep track of dates and times and combine them in a *SINGLE LOG ENTRY* once the IEP is finalized.
- ❖ Be sure to check the Service Type code you are using to make sure it is correct as they change periodically.

Progress Reports:

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

Add a new service log Prefill from last service log

Service Date* 12/12/2022 Service Type* 92521 Eval Speech Fluency stuttering/cluttering

School Example School

Start Time 10:00 AM PM Location 03-School

Duration H:MM 2:30


Goals And Objectives Manage Goals and Objectives

It is fine to leave this box blank.


Comments* Evaluation day 11/15 90 minutes, initial eval
Evaluation day 11/22 60 minutes, final evaluation
Details as noted in student finalized IEP

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 entirely and it will not be billed.

Medicaid eligible claims that are older than 2 weeks are sent to DPHHS for processing. To make changes to logs that have been submitted, please contact Lisa at lwaterman@mt-schools.org

❖ ❖ **TIP** ❖ ❖ You can review all of your logs with the option to edit or delete them by simply hitting the search button. 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 a log by selecting the + button to the right of the student name
- This report can be exported into Excel or as a PDF

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'.

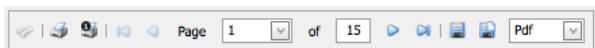
Run Report

Rows Returned: 8

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 - Gp	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 - Gp	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.
 - Service logs are ordered from most recent to oldest.
 - Results are grouped by the log type.
 - 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.
 - **Hover the cursor over the pictures for instructions**
 - Drop down to choose the report format. 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

- ❖ Therapy aides 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 or supervisors
 - beginning and end dates

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.

Each Supervision Log Needs to be Approved

Supervision Log Wizard

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

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](#)

❖ 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.

❖ **Select the Save button** at the bottom of the screen.

View Supervision Logs Entered

- ❖ From Supervision Log Wizard **SELECT: View Previously Entered Supervision Logs.**
- ❖ **SELECT Search** for all logs to appear or search by provider and/or student.
- ❖ View previously entered supervision logs and comments.
- ❖ Delete one or more services that he or she may have mistakenly approved.
- ❖ Unfortunately the program does not allow supervisors to view logs for specific students when the aide has multiple supervisors.
- ❖ Please check for logs that need to be reviewed on a regular basis. Claims for Medicaid eligible students cannot be submitted until the logs are reviewed.

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

