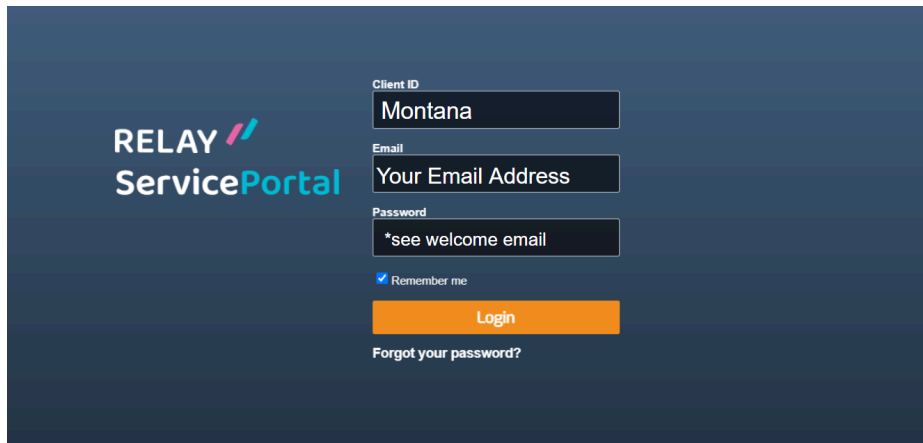


Service Portal Handout: Personal Care and Nursing

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



The *Client ID* is **Montana**

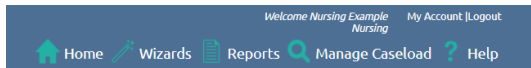
NOTE: *Client ID and Password are Case sensitive.*

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

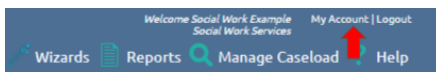
Home – Returns to Home page

Wizards: PCA and Nursing Wizard – Add and delete service times. Use the PCA and Nursing Wizard to record a non-billable log for comments and absences.

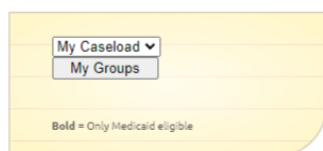
Reports – Can be saved or printed

Manage Caseload - Add/remove students from caseload

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



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



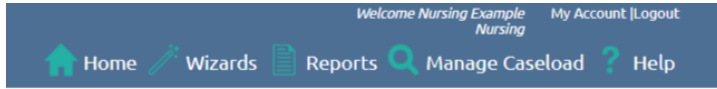
– Choose My Account in the upper right corner of your screen.

– **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: [All] School: [All] Results Per Page: [10] Search: [Number of students listed - 13]

Last Name: [Exa] First Name: [] State Student 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
<input type="button" value="Add"/>	Not AA District	11111119	Example	Nursing		1/1/2008	Female	Example School	Fourth	True
<input type="button" value="Add"/>	Not AA District	11111120	Example	Nursing2		1/1/2009	Male	Example School	Third	True
<input type="button" value="Add"/>	Not AA District	11111121	Example	Orientation/Mobility		1/1/2010	Female	Example School	Second	True
<input type="button" value="Add"/>	Not AA District	11111113	Example	OT		1/1/2002	Male	Example School	Tenth	True
<input type="button" value="Add"/>	Not AA District	11111114	Example	OT2		1/1/2003	Female	Example School	Ninth	True
<input type="button" value="Add"/>	Not AA District	11111122	Example	Personal Care		1/1/2011	Male	Example School	First	True
<input type="button" value="Add"/>	Not AA District	11111123	Example	Personal Care2		1/1/2012	Female	Example School	Kindergarten	True
<input type="button" value="Add"/>	Not AA District	11111117	Example	Psyche		1/1/2006	Male	Example School	Sixth	True
<input type="button" value="Add"/>	Not AA District	11111118	Example	Psyche2		1/1/2007	Male	Example School	Fifth	True
<input type="button" value="Add"/>	Not AA District	11111115	Example	PT		1/1/2004	Male	Example School	Eighth	True

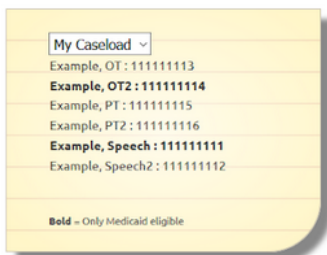
Export to Excel

- Type in a few letters from the last name of a student to find them easily
- Click the *Add* button 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 the *Link to Forms and Documents* on your home screen.**

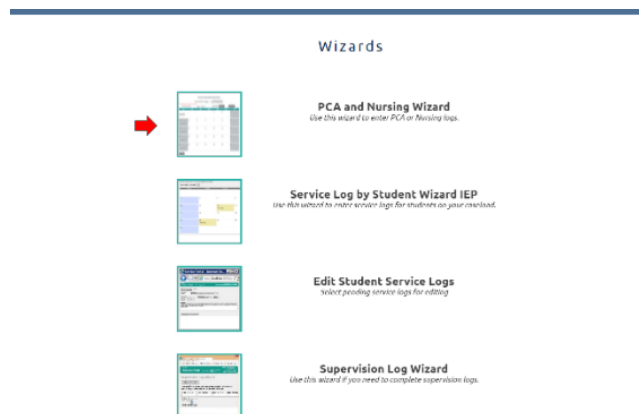
Home Screen and Announcements Page



- 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 Service Times

- ❖ Service times are entered through the Wizard tab
- ❖ Select the **Wizards** tab in the upper right of the home page
- ❖ **Select** PCA (personal care attendant) and Nursing Wizard
- ❖ The total time for all service types is entered for each day

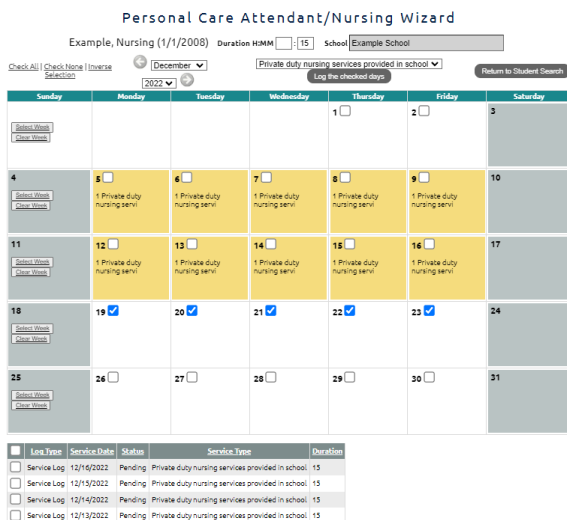


INDIVIDUAL Service Logs for Personal Care

- ❖ Select days to log service times
 - Fill in the duration hours/minutes
 - Select **ALL** areas listed on the Child Profile Form
 - Select the days for that duration amount
 - Select the log checked days button
- ❖ Enter additional daily logs with different times.
- ❖ The calendar will show yellow boxes when services are logged.
- ❖ There should be 1 service per day with total time.
- ❖ Find individual logs at the bottom of the screen to easily delete errors.



INDIVIDUAL Service Logging for Nursing Services



- ❖ Select days to log service times
 - Fill in the duration hours/minutes for a day
 - The total is by the **DAY** and not by service
 - Select the days for that total amount for a day
 - Select the log checked days button
- ❖ Enter additional daily logs with different times.
- ❖ The calendar will show yellow boxes when services are logged
- ❖ There should be 1 service per calendar day with a daily total.
- ❖ Find daily log totals at the bottom of the screen to delete errors

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*
- ❖ The calendar will show a pink box with the non-billable entry when saved.

****TIP** Logs can be recorded daily, weekly, or monthly. Please note that times for nursing and personal care should be entered by the 5th of the following month.**

Wizards



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



Service Log by Student Wizard IEP
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.

Reviewing, Correcting, and Deleting Service Logs

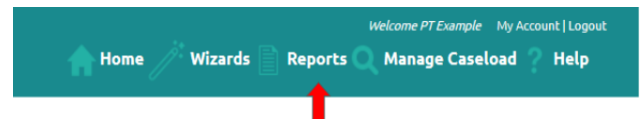
- ❖ From the Wizard, select Edit Student Service Logs
- ❖ Type in a few letters of the student's last name to pull up saved logs
- ❖ The delete button will remove the log and it will not be billed.
- ❖ Claims that are 2 weeks in arrears and earlier are sent in for processing.

To fix processed claims, please contact Lisa in the SSoM office.

****TIP** Review all service logs with the option to edit or delete; use 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: July 2017 | Start Date: 7/1/2017 | End Date: 7/31/2017 | Student selection: [All]

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

Run Report ←

Rows Returned: 14

Student Name DOB: 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 by date for a student

For more information on personal care and nursing services, please refer to additional *forms and documents* from the announcement page of the Service Portal

- ❖ A physician's signature is required on a completed child profile form cpf.
- ❖ A copy of the child profile form cpf should be scanned and sent to Lisa at SSoM so the information can be added to the student profile.
- ❖ A daily log record of services must be kept by the district for 6 years 3 months in case of an audit. This daily log needs to be signed by the provider. Nursing services require a prior authorization from Mountain Pacific Quality Health.

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



