Training Manual for Related Service Log - Providers

Document Details

Click on the black button of the student to view the finalized document.   To add Related Service Log attendance for a student, hover the mouse over **Log Entries** and click on **Related Service Log**.

After clicking on Related Services Log, the following screen will be available:

- To add attendance into the Related Service Log, select the related service from the **IEP Related Service** drop down menu, being sure that the dates of service corresponds to the time period for which attendance is being added. The Ratio, Frequency, Period and Duration from the student's finalized IEP for the selected service will display across the top of the screen.

- To the left of the calendar:
    o Select the appropriate **Log Type** (i.e., Service Provided, Student Absence, etc.).
    o The Provider name will auto-fill with the name of the provider recording attendance.
    o Select the **Actual Ratio**.
    o The **Quantity/Day** will default to 1 and is to designate the number of sessions provided. This number should never be changed

- o Select the **Setting**. (Public School, Private Preschool/Daycare, Private/Residential School, Clinic, Home, or Other)
  - o Select the **Session Start Time** and **Session End Time**. The Duration will be calculated in minutes based on the selections for Start and End Time.

    - Duration should NOT be selected from the dropdown unless recording a service that is not Medicaid claimable.

  - o Select the **CPT Code** by clicking on the link to the right of the text box and choosing the appropriate code from the list.

  - o Select the number of **CPT Units** based on the Calculated Duration and the Session Time specified for the selected CPT Code.

- To add the dates of service, **click <u>on the number</u>** for the first day of service for the month. This will highlight the date in gold on the calendar and put a checkmark in the box for that date. If adding multiple dates of attendance, click in the checkboxes for subsequent days for the selected Log Type in the month.

  Note: due to the potential for each day of service to have its own session times and CPT code, as well as the need to sign each entry as soon as possible after the session has ended, adding multiple dates of attendance simultaneously is NOT recommended.

- When all information has been entered, click the **Add** button. The Related Service Log entries will list at the bottom of the screen (see below). Click the **Save** button to save entries.

Session Notes

To enter Session Notes, click on the Notes icon to the left of the Provider e-Signature column.

Enter notes in the pop up window and click **Save** to save the notes or **Cancel** to return to the Related Service Log.

Once the notes are saved, the notes icon will turn gold. To view or edit daily notes, click on the gold notes icon. Notes may be edited until such time as the entry has been electronically signed.

Electronic Signature
To sign an attendance entry, click on the pen icon for the date to be signed.   The following pop up message will appear:

Once signed, the session note may not be edited in any way. Click the **Sign** button to electronically sign, or click C**ancel** to return to the Related Service Log.

After the attendance entry is signed, the pen icon will turn yellow. Hovering over the icon will provide the name and credential of the signer, as well as the date and time of the signature.

If the Provider is **NOT** a Licensed Provider, the designated USO/UDO Provider will be unable to sign entries until the service provider has signed.   The USO/UDO may sign multiple entries simultaneously using the "Sign All" button.   (Because session notes must be recorded as soon as practical after the session has been

provided, there is no option for the Provider to "Sign All".) A separate notepad is also available for the USO/UDO to enter optional notes.

Deleting an Entry

To delete an entry, click on the delete icon to the left of the dated entry.

	Date	Code	Units	Service Name	Qty	Ratio	Duration	Log Type	Provider	Notes	e-Signature	USO/UDO	Notes	Sign All
✖	9/15/2010	92507	1	Speech/Language Therapy	1	1:1	45 mins	Service Provided	Shaw, Mary	📋	🔲			N/A
✖	9/17/2010	92526	1	Speech/Language Therapy	1	1:1	1 hr	Service Provided	Shaw, Mary	📋	🔲			N/A
✖	9/20/2010	92507	1	Speech/Language Therapy	1	1:1	45 mins	Service Provided	Shaw, Mary	📄	🔲			N/A

Related Services Log Entries - September 2010 (Filtered by Permissions)

If the entry is not yet electronically signed, it may be deleted by the provider or by a user with Central Office level permissions. If the entry is electronically signed, only the provider who signed the entry can delete it.

If the entry was already imported into Medicaid Direct, a message will be sent to the Central Office level users indicating that a CLAIMED Related Service Record was deleted from IEP Direct:

NOTES: **In order to enter attendance in a student's Related Service Log:**
> - **the student MUST have a finalized document**
> - **the student must have related services entered on the IEP**

In order for the Related Services Provider to use the Electronic Signature feature:
> - **the provider must be entered into IEP Direct as a user**
> - **the provider must have Related Service Group Access (i.e. Psychological Counseling, Speech, Physical Therapy, etc.)**
> - **the provider's credentials must be specified**
> - **the electronic signature feature must be enabled for that user**

Letters/Reports

The following reports related to RS Log are available on the Letters/Reports page of IEP Direct depending on the user's level of access:

- **Report - RS Attendance by Provider with Electronic Signature**
- **Report - RS Attendance By Student**
- **Report - RS Attendance Summary by Service: Required/Recorded Units of Service**
- **Report - RS Attendance Summary: Required/Recorded Units of Service**
- **Report - RS Log E-Signature Validation**
- **Report - RS Medicaid Compliance Checksheet (In-District Services)**
- **Report - RS Medicaid Compliance Checksheet (Out-of-District Services)**
- **Report - RS Monthly Service Report**
- **Report - RS Students with Attendance by Provider**
- **Report - RS Students with Attendance by Service**
- **Report - RS Students without required USO/UDO by Service**
- **Report - RS Summary of Daily Notes**
- **Report - RS Summary of Related Service Session Notes with CPT Codes**

If unable to access to a report on your Letters/Reports screen, please contact your **Central Office**.

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