Medicaid Claiming for Early Childhood and School Based Programs Online Documentation

Greenbush Access  
https://www.greenbush.org/167/Medicaid-Billing

CompuClaim Access  
https://serviceportal.compuclaim.com

Client ID: Greenbush

Billing Office Help Desk:  
1.888.654.8701

Support Services:

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Services Portal Handout:

**Therapists / Service Providers**

*Web site and Logging In*
https://serviceportal.compuclaim.com

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

**Client ID:** Greenbush
**Email:** Your Email Address
**Password:** Password Assigned By Greenbush

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

**Resetting password:**

Please add notification@meduclaim.com to your “Safe Senders” list within your email application to help avoid this notification being tagged as SPAM.

To reset your Service Portal password, please follow these instructions:

- From the Service Portal logon screen, click “Forgot your password?”
- Enter Client ID: Greenbush and E-mail Address. Click Continue to start the password recovery process.
- You will receive confirmation that a “new random password has been created and sent to your e-mail”.
- Access your email application. Look for the “CompuClaim Service Portal Login Information” email and open. Your temporary password will be inside.
- Go back to the Service Portal window and click “Return to Login Page”.
- Enter your Client ID, Email Address, and New temporary password. Click Login.
- You will be prompted to create a new password that must be different than your old password; at least 7 characters long; have at least one uppercase letter; at least one lowercase letter; and at least one number. You may not re-use any previous password for 180 days.
- Click Continue to confirm new password change. If successful, you will be entered into the Service Portal.
Navigating the Site

The top right corner of the Services Portal displays the Navigational Links that are available continuously throughout the system.

- **My account** – change password [My Account]
- **Log out** – ends your session [Logout]
- **Home** – Always brings you back to Home page [Home]
- **Wizards** contain links to a variety of tasks
  - Service Log by Student – Adding and Deleting Service Logs
  - Supervision Log – Lists the providers that the logged in professional are required to supervise and the students’ Service Logs
- **Reports** – Live Reports can be saved or printed [Reports]
- **Manage Caseload** - staff can easily add/remove students from their caseload
- **Help** – customizable by admin user [Help]

Caseload on Home Page

Caseload – Students will appear in **BOLD** or regular font. **BOLD** font indicates student with a Medicaid ID number.

- **Manage Caseload** link - from “Manage Caseload” link
From the caseload, click on the student’s name to view detailed information regarding the student, which is organized under tabbed headings:

- **Student** – student’s demographic info
- **Special Education** – IEP info (bulk import or manually entered)
- **Service Logs** (there is a button available here for navigating to logging calendar)
- **Supervision Logs**

**Managing a Caseload**

**To Add Students to your caseload:**

- Make sure the “Only show students on my caseload” box is not checked.
- Search for the student you need to add by typing the first few letters of the student’s last name in the search box and click on “Search”. For best results, keep the search as broad as possible in order to capture more students in the search.
- When you locate the student, click on “Add” next to the student’s name.
- Click on “Home” in the toolbar when finished and you will see your updated caseload.

**To Remove Students that shouldn’t be on your caseload:**

- Click on “Only show students on my caseload”.
- Click on “Remove” next to any student you need to delete from your caseload. (This will not delete the student from the system but will simply remove the student from your active caseload.)
WIZARD: Service Log By Student

Services can be entered individually, group, or over multiple days

Click: Link for Wizard
Select Service Log by Student Wizard

Select one or more students or check Select All to enter service logs for all students and then click next.

INDIVIDUAL Service Logging

This is to record a service, non-billable service, or absence.

Select One Day – Then click Next

Select type of log
(Service Log, non-billable, student absent, etc.).

Non-billable Entries and Absent codes are only available for Individual Service entry.

Service Log is a default choice.

Click Continue
Date is populated – Option to copy previous Service Log “Prefill from last servicelog” (all data except comments is captured).

1. Required fields display a red asterisk.
2. Business rule in place for minimum character requirement in comments section. Please enter brief description of encounter.
3. Upon saving, you arrive at the calendar where you can continue to enter service logs.

Deleting a Service Log

Service Logs can be deleted if they haven’t been billed

1) Locate Service Log on the calendar & select the log.
2) Click Next.
3) if there is a trash can before the Service Log, it can be deleted.
Group and Multi-day Service Entry

Group Service Entry:
Select the group of children serviced.

Click Next

When selecting more than one child, just above the calendar a check box called GROUP SERVICE appears. If this is clicked all children selected from the previous screen will be included in the group service.

Check a day and Click Next

If 3 children are checked then THREE logs will be created. Take a look at the Nicole Aguillon screen shot where it says “1 of 3”. All of the required data fields populated will copy exactly to the next log after saving. NOTE: You will need to update the Goal and Comments for each new student.

Multi-Day Entry:
This may be used for individual or group services.

After selecting student/s check the desired days.

A screen similar to the one on the right will appear. All of the required data fields populated will copy exactly to the next log after saving.

NOTE: When recording group services the logs are ordered by DATE then by Student. In this way the provider record all services delivered on one day and once that daily group of services is complete it will move on to the next day.

Take your time: Look at the dates and names as they change.

Once a log is saved it can only be edited under edit service logs or deleted and then re-entered. There is NOT a back to previous log button.
Reports

Logging Summary Report

Access: All therapists, nurses and mental health service providers . Location:

Under Reports menu in Navigation Bar. [Reports]

Features: Grid view of services delivered. Exportable to Excel and PDF.

Logging Summary For Speech1 Speech1

<table>
<thead>
<tr>
<th>Month/Date of Service</th>
<th>Start Date</th>
<th>End Date</th>
<th>Student Name</th>
<th>Service Type</th>
<th>Description</th>
<th>Progress Report</th>
<th>Area General</th>
<th>LLC</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 2017</td>
<td>5/1/2017</td>
<td>3/20/2017</td>
<td>Bailey</td>
<td>Speech &amp; Language</td>
<td>Treatment of \ding{117}</td>
<td>70</td>
<td></td>
<td>Provide a detailed and objective description of the intervention and student response to today's therapy/encounter.</td>
<td></td>
</tr>
</tbody>
</table>

Detailed Student Report

Access: All therapists, nurses and mental health service providers

Location: Under Reports menu in Navigation Bar [Reports]

Features:
1. Date(s) of service search by monthly drop down or choose a date range.
2. TIP: Always click Run Report when parameters are changed.
3. Each student’s services are ordered from most recent to oldest.
4. 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.
5. There is a page break between students.

Select Date range from pulldown or enter the date range, make the Student selection and then click ‘Run Report’.

Run Report

Once Run Report has been hit there is a navigation bar for the report that has the following functionality from left to right (hover cursor over the icons for instructions, too):

a. Print report
b. Print current page
c. Scrolling through pages
d. Save file to desktop.
e. TIP: It may be faster to scroll through the report after it is saved as a PDF.
f. Drop down to choose report format. We provide a variety of options, but PDF tends to work best.
Service Approval / Supervision Logs

The Supervision Log approval process has been updated to increase compliance and documentation. The updates also add functionality for supervisors to more easily view previously supervised logs. Here is a quick summary of the changes.

**PART 1: Each service is approved.**

There is not a monthly choice. Instead, the supervisor chooses a provider and student. On the next screen (on right) the supervisor can then choose one or more services to approve simultaneously.

There can still be ONE comment entered that will be saved with all of the service logs checked on the screen.

**CLICK** one of the Save buttons at the bottom of the screen.

**Part 2: 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. The supervisor 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.
Sharing Session Notes in the Service Portal

Supervising providers and their licensed assistants see previously entered logs ONLY when the student is shared on both provider’s caseloads (i.e. OT and COTA, PT and PTA).

For example, if a Licensed Occupational Therapist and a Certified Occupational Therapy Assistant both provide services for the same student and this student is actively on both user’s caseloads, then the Shared Service tab will populate with the logs entered by the other provider.

To access the feature, the user clicks on a student name from their caseload on the Portal’s Home page.

This takes the user to the Student Information Page where they select Shared Logs. Please note: you may proceed to the logging calendar if/when ready from either the Shared Logs tab or Service Logs tab.
Goals and Objectives

OVERVIEW

• Providers can manage goals and objectives based upon a student’s IEP.
• Goal data is entered either manually or imported from IEP software program.
• The goals for a specific student shall appear in the service log for a user to select one or more goals for each log.

Managing the Goal Bank:

On the Announcement Page in the My Caseload list, click on the student you would like to add goals to within the student’s goal bank.

Click on the Manage Goals tab.

Select New to add a Goal/Objective. The fields of Goal ID, IEP Start Date and IEP End Date are optional fields. When the goal is complete click Update. Repeat as needed.

• A listing of current goals in the bank will appear as choices in the service log.
• Please note, only the goals relevant to one’s specialty will appear. For example, Speech staff will only see the speech goals. These goals are also shared which allows all speech staff serving this child to see the same goals. If a speech person adds a new goal all of the speech staff shall see that goal for the student.

One may Edit or Delete a goal. Again, any changes here will impact the Goal Bank for providers with the same service type.

Please Note: Deleting a goal does NOT delete the goal from the log, only from the Goal Bank.
Adding Goals to Service Log:

Providers will now have two ways to enter Goals:

- Manual entry into the Goals and Objectives box or
- Use of the Goal Bank.

Select a Service Type to view Goals and Objectives. Note, evaluations will not require the use of Goals and Objectives.

Fill out the Service Time, Progress Report and then Click Manage Goals and Objectives.

A pop-up window will appear containing the Goal Bank.

- Check one or more goals you are working on.
- As you check the goals you will notice they are added to the Goal Text box.
- To Exit the Goal Window click the "X" in the top right corner.
- You may add text to the Goals and it will not impact the Goal Bank.
- All changes will be permanent in the log for reporting.
- Any Goals Deleted from the Goal Bank will have zero impact on the log that is saved.
- To check your log, go to Reports and then Detailed Student Report.
Caseload Grouping Option

Overview

Users may break up their student list into sub-groups in the Service Log by Student Wizard.

For example a user:

- sees students from multiple districts and they can create a district specific group;
- works at a high school and then a middle school and the user creates specific groups by school;
- creates groups based upon certain days of the week if desired.

_Users may choose to use or not use this functionality to log student services._

Instruction of use:

The user can _create groups_ in two areas in the service portal.

The first option is on the home/ default page. Click _My Groups._

Or the second option would be to enter the wizards page.

Click _Service Log By Student Wizard_

To start using the new feature click _CREATE a GROUP_ button.

The Manage Student Groupings page will appear.
Under **My Group Names**, click **New**.

Type in the group name in the **Group Name** text field. Click **Update**.

To edit the group name, click **Edit**. Fix the group name or click **Delete** to erase completely.

After the group name is created, **Choose the Group** you would like to add students to and then click **Close**.

Choose the students by clicking a checkmark to the left of the student full name. After selecting multiple students, click **Close**.
Click the Select button to preview the names chosen for the group. If you like what you see, click, Save Group. If you would like to make a change, re-select the group and kiddos. Then Select and Save Group.

The group(s) will display on the bottom in My Student Group grid view.

1) Collapse All Rows: This will shrink all the rows in the Grid view

2) Expand All Rows: This will Expand all the rows inside the Grid view

Once you have made the initial Group names, you will select the groups for logging from the Student Wizard page.

Go to the Service Log By Student Wizard page, from the dropdown “search a group to filter by” select the group and your list of students will populate.

To go back to the ALL Caseload that you originally have, after selecting a group, just click the X or Wizards from the toolbar.