

# Psychological Counseling

**Special Education Department  
Rush-Henrietta Central  
School District**

**Office (585) 359-7921**

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The Following are standards and procedures set forth by the Rush-Henrietta Central School District to ensure compliance with State and Federal Medicaid-in-Education regulations.

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## **Provider Credentials**

- Services must be provided by a NYS licensed and currently registered psychiatrist, psychologist, or a NYS Licensed Clinical Social Worker (LCSW).
- Services may also be provided by a NYS Licensed Master Social Worker (LMSW) “Under the Supervision of” (USO) a NYS licensed and currently registered psychiatrist, psychologist or LCSW.
- All licensures and certifications should be current and up-to-date.
- Licensed providers should have a valid National Provider Identifier (NPI).
- Electronic and scripted signatures should match the name on the license and certification documentation.
- If you have a change in name or address, follow the protocol and guidelines for updating your licensure from the Office of Professions at the New York State Education website, <http://www.op.nysed.gov/prof/sw/lmswforms.htm>.

## **Individual Education Plan**

- Services must be listed on the student’s Individual Education Plan (IEP).
- Services must be delivered as recommended by the Committee on Special Education (CSE).

## **Referral for Psychological Counseling** **(Written Order)**

- A Written Order for service must be on file to claim for Medicaid reimbursement.
- The Written Order is the documentation that establishes medical necessity for the related service to be furnished and constitutes medical direction of the ordering professional.
- If there is no Written Order, for the purpose of Medicaid billing, one should be completed, filed appropriately and a copy sent to the appropriate staff member.
- The following elements must be included on all Written Orders:
  1. The name of the child for whom the order is written.
  2. The complete date the order was written and signed.
  3. The service(s) being ordered. Note: The frequency and duration of the ordered service must be either specified on the order itself or **the order can explicitly adopt the frequency and duration of the service in the IEP by reference.**
  4. Ordering provider's contact information (office stamp or preprinted address and telephone number).
  5. Signature of a NYS licensed, registered, and/or certified, as relevant, physician, physician assistant, or licensed nurse practitioner acting within his or her scope of practice (for psychological counseling services, this also includes an appropriate school official).
  6. The time period for which services are being ordered.
  7. The ordering practitioner's NPI or license number.
  8. Additionally, appropriate ICD-10 Code(s) must be included with diagnosis and/or reason for ordered services.

**Note:**

A new psychological counseling referral (following all previously mentioned guidelines) must be obtained any time there is a change to psychological counseling services on the student's IEP.

## **Directions for Printing a Written Order or Referral for Services**

1. Log into Frontline.
2. Click on My students.
3. Type in the name of the student for whom you are printing an order.
4. Click on the Black box for the current IEP.
5. Click on Letters and Reports.
6. Check Report – Prescription Form for Related Services (Finalized Document).
7. Click on Process.
8. Choose a Service Group – Psychological Counseling.
9. Click on Next.
10. Click on the PDF to open the document.
11. Press Control P to print the order/referral.

The order/referral will be pre-printed with the student's name, date of birth, related service, frequency, and duration. The provider needs to complete the bottom portion of the form with his/her information. Two copies of the written/order referral are required for the Special Education Department. One copy needs to be sent to the Medicaid clerk and the other copy needs to be sent to the SPED coordinator's secretary to be put in the student's cumulative folder.

If you are having trouble accessing a script, please contact the Medicaid Clerk at 359-7921.

## **Documenting Delivery of Service**

### **(RS Log)**

- Rush-Henrietta School District staff must maintain documentation of Related Service treatments through use of the RS Log in Frontline.
- Attendance for **ALL** scheduled services must be entered into the RS Log for each student, including student and/or provider absences.
- All services provided must be entered and electronically signed, by the service provider, in the RS Log on a daily basis.
- Electronic signature indicates that the services entered into the RS Log were provided as stated.
- **Session Notes** must be completed for every service delivered.
  1. Session notes must be entered electronically in the RS Log at the time services are entered.
  2. Session notes must include a description of the activity or a brief description of the student's progress or response to therapy made by receiving the service during the session.
  3. Session notes cannot be altered or edited once electronically signed.
  4. If a mistake was made, the entry must be deleted and re-entered.
- All actions in the RS Log must be performed by the related service provider delivering the service. Login and passwords should never be given to another individual for the purpose of entering anything in the RS Log on your behalf. If you forget your password, please contact the Medicaid clerk at 359-7921.
- RS Log entries will be considered "incomplete" unless all elements are included.
- RS Log Training Manual is available for detailed information regarding entering services and maintenance of the RS Log at the end of this packet.

## **Quarterly Progress Reports**

- Although Quarterly Progress Reports must be completed as required by program and IDEA guidelines, copies do not need to be submitted to the Medicaid Office.

## **Under the Supervision Of** **(USO)**

“Under the supervision of” requirements apply only to Licensed Master Social Workers (LMSWs) and are described here.

Supervision of the psychological counseling services provided by the LMSW, with respect to each Medicaid student, shall consist of contact between the LMSW and supervisor during which:

- The LMSW apprises the supervisor of the diagnosis and treatment of each student.
- The LMSW’s cases are discussed.
- The supervisor provides the LMSW with oversight and guidance in diagnosing and treating students.
- The supervisor regularly reviews and evaluates the professional work of the LMSW.
- The supervisor shall provide at least one hour per week or two hours every other week of in-person individual or group clinical supervision.
- Copies of USO documentation should be forwarded to the Medicaid clerk in the Special Education Department.

## **Random Moment In Time Study**

A Random Moment Time Study (RMTS) is a mechanism for identifying the amount of time School Supportive Health School Program (SSHSP) practitioners spend delivering Medicaid reimbursable activities. RMTS is not a management tool used to evaluate staff activities or performance.

All moments will be received via e-mail.

- You will receive an email notification with 48 hours to reply to your moment.
- At the time of your moment, you will log onto a secure website using the name and password provided in the email.
- You will respond to a series of questions describing the activity you were performing at the time of your moment.

### **Note:**

- All data transferred and collected is secure and confidential.
- You will have 48 hours to complete your response in order for it to be considered valid.
- You will receive one follow-up email 24 hours after the moment if you have not yet completed your moment.



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**CERTIFICATION OF  
UNDER THE DIRECTION AND ACCESSIBILITY  
Medicaid “Under the Supervision of” Services  
School Year: 2017 - 2018 OR ESY: 2017**

I, \_\_\_\_\_, NYS Licensed and Registered \_\_\_\_\_, with  
 (Name of licensed provider) (Discipline title)  
 current license number \_\_\_\_\_, and NPI number \_\_\_\_\_, certify that I am providing  
 "Under the Direction" services to the following Related Service Providers in accordance with all  
 appropriate regulations and guidelines:  
 From \_\_\_\_\_ To \_\_\_\_\_  
Date Date

Name of Therapist	

I further certify that accessibility with these provider(s) will be maintained in the following manner in accordance with all appropriate regulations and guidelines:

CM = Conference/Meeting	DR = Documentation Review
EM = email	FX = Fax
TA = Therapy/Attendance Overview	TC = Telephone Call
TX = Texting	SV = Site Visit

**Note:** New York State Social Services Law defines medical appropriateness below:

**§ 365-a. Character and adequacy of assistance**

The amount, nature and manner of providing medical assistance for needs persons shall be determined by the public welfare official with the advice of a physician and in accordance with the local medical plan, this title, and the regulations of the department.

"Medical assistance" shall mean payment of part or all of the cost of medically necessary medical, dental and remedial care, services and supplies as authorized in this title or the regulations of the department, which are necessary to prevent, diagnose, correct or cure conditions in the person that cause acute suffering, endanger life, result in illness or infirmity, interfere with such person's capacity for normal activity, or threaten some significant handicap and which are furnished an eligible person in accordance with this title and the regulations of the department. Such care, services and supplies, together with such medical care, services and supplies provided for in subdivisions three, four, and five of this section, and such medical care, services and supplies as are authorized in the regulations of the department:

[For effective and termination dates, see notes below. See also, part (a) below.] Services of qualified physicians, dentists, nurses except that private duty nursing shall be provided subject to section three hundred sixty-seven-1 of this chapter, and private duty nursing services shall be further subject to the provisions of section three hundred sixty-seven- of this chapter, optometrists, and other related professional personnel;

[Eff, June 30, 1994. See also, part (a) above.] Services of qualified physicians, dentists to the extent authorized by paragraph (e) herein, nurses, optometrists, podiatrists and other related professional personnel; care, treatment, maintenance and nursing services in hospitals, nursing homes that qualify as providers in the Medicare program pursuant to title XVIII of the federal social security act.

\_\_\_\_\_  
Signature of Licensed Professional

\_\_\_\_\_  
Date

## USO (Under Supervision Of)

Must be handwritten

Meeting Date: \_\_\_\_\_ Start Time: \_\_\_\_\_ End Time: \_\_\_\_\_

Must be 1 hr/wk or 2 hrs over 2 weeks

Print Name of Provider (LMSW): \_\_\_\_\_

Signature of Provider (LMSW): \_\_\_\_\_ Date: \_\_\_\_\_

Students Reviewed and comments:

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Concerns Addressed:

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Please initial and date the comments you feel are correct.

Comment	Initial and Date
Therapies delivered are appropriate for students	
Therapies are delivered as indicated on students' IEPs	

Print Name of Supervisor: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

License #: \_\_\_\_\_ Expiration Date: \_\_\_\_\_ NPI: \_\_\_\_\_

## Related Services Log


The **RS Log (Related Services Log)** is used by providers to enter status information for services that have been delivered to the student, based on the student's IEP. Services that are claimable for Medicaid are identified and can then be submitted to Medicaid Direct for processing.

Electronic signature functionality for the Provider and electronic counter signature functionality for the USO/UDO (Under the Direction Of/Under the Supervision Of) are available in the RS Log. This functionality allows the Provider, and as required, the USO/UDO provider to systematically sign, date and time stamp the service entry. USO/UDO provider signatures are required when the provider of record is not licensed and the service provided is Speech Therapy, Physical Therapy, or Occupational Therapy.


Once an entry has been saved it cannot be deleted according to NYS Medicaid regulations. The entry can only be invalidated and then re-entered with the correct data.

The RS Log is only available when the student's IEP contains **Related Services** and is finalized.

To enter data in the RS Log:

1. From the **My Students** age, click  access the student's finalized document.
2. Click on the **Related Service Log** link under the **Log Entries** tab.
3. Select the service from the **IEP Related Service** drop down menu. Be sure the dates of service corresponds to the time period for which attendance is being added.
4. The calendar defaults to the current day. To select a different day, click on the number of the day on the calendar. It will then be highlighted in orange.
5. Select the **Log Type**.
6. **Provider** field auto-populates with the provider recording attendance.
7. Select **Actual Ratio**.
8. The **Quantity/Day** field defaults to 1 and should never be changed.
9. The **Setting** defaults to the **Recommended School** entered in the **Committee Recommendations** section of the latest finalized IEP. To change the default value, select the **Setting** from the drop down menu. If "other" is selected, a new text box will display so that the setting name can be typed in.
10. Select the **Session Start Time** and **Session End Time**. The AM/PM will default according to the time entered. Make alternate selections as necessary.
  - **Do not** select the time from the **Duration** field unless the service is NOT Medicaid claimable.

13. Click **Add**.

14. The row of service now displays at the bottom of the screen. To enter session notes, click . Click **Save** when finished. If allowable by the district, click the check box to indicate that session notes are on file (this means the provider has paper/pen session notes).


15. To view the current goals and/or objectives for the student, click **View Goals & Objectives**.

To electronically sign the session, click  and then click **Sign**.

## Related Service Log

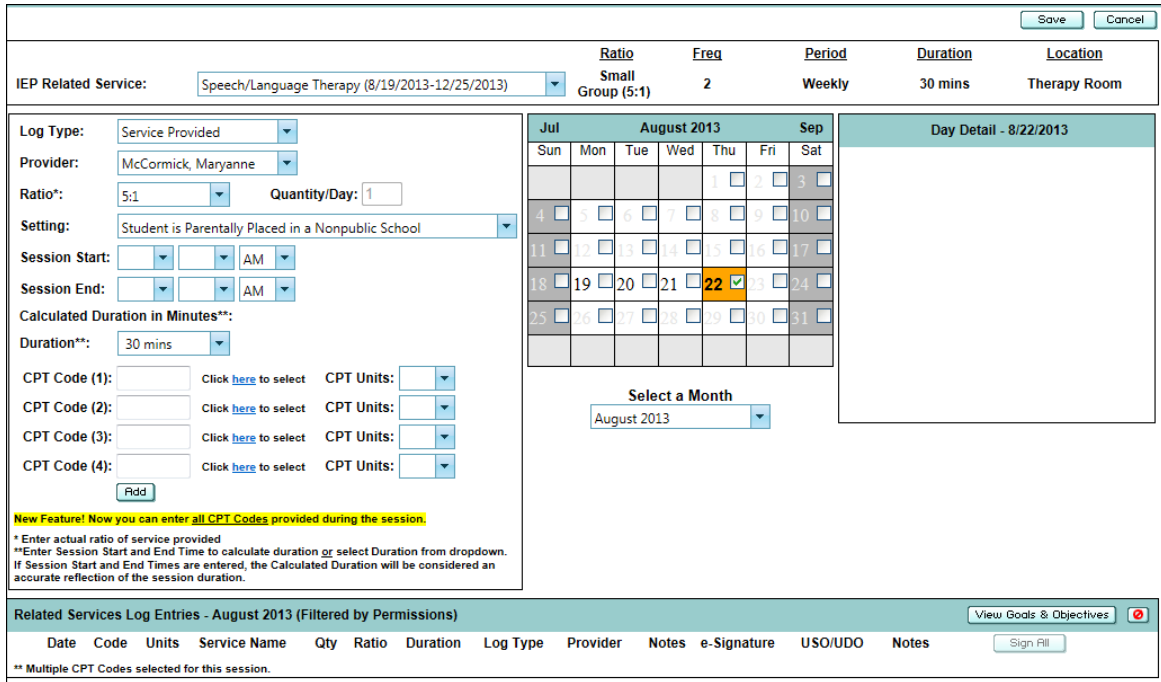
(For use in entering RS Attendance for an individual student)

### Adding an Entry for Medicaid eligible services (Speech, OT, PT, etc.)

1. Click the black button  to view the finalized document for the student. To add Related Service Log attendance for a student, place the mouse pointer over Log Entries to expand the menu, and then click the Related Service Log link.



2. Clicking the Related Services Log link displays the following screen:



The screenshot shows the 'Related Services Log' entry form. At the top right are 'Save' and 'Cancel' buttons. The form is divided into several sections:

- IEP Related Service:** A dropdown menu showing 'Speech/Language Therapy (8/19/2013-12/25/2013)'. Below it, the 'Ratio' is 'Small Group (5:1)', 'Freq' is '2', 'Period' is 'Weekly', 'Duration' is '30 mins', and 'Location' is 'Therapy Room'.
- Log Type:** A dropdown menu showing 'Service Provided'.
- Provider:** A dropdown menu showing 'McCormick, Maryanne'.
- Ratio\*:** A dropdown menu showing '5:1' and a 'Quantity/Day' field with '1'.
- Setting:** A dropdown menu showing 'Student is Parentally Placed in a Nonpublic School'.
- Session Start:** Two dropdown menus for time (AM/PM).
- Session End:** Two dropdown menus for time (AM/PM).
- Calculated Duration in Minutes\*\*:** A dropdown menu showing '30 mins'.
- CPT Code (1-4):** Four input fields for CPT codes, each with a 'Click here to select' link and a 'CPT Units' dropdown menu.
- Buttons:** 'Add' and 'View Goals & Objectives' buttons.
- Calendar:** A calendar for August 2013 with a 'Select a Month' dropdown menu. The date '22' is selected.
- Day Detail:** A section for 'Day Detail - 8/22/2013'.
- Footer:** A table header for 'Related Services Log Entries - August 2013 (Filtered by Permissions)' with columns: Date, Code, Units, Service Name, Qty, Ratio, Duration, Log Type, Provider, Notes, e-Signature, USO/UDO, Notes. There is a 'Sign Fill' button and a note: '\*\* Multiple CPT Codes selected for this session.'

3. To add attendance, select the Related Service from the **IEP Related Service** drop down menu, ensuring that the date range 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.

4. Next, to the left of the calendar:
  - a. Select the appropriate **Log Type** (i.e., Service Provided, Student Absence, etc.).
    - **NOTE:** Student Not Available or Provider Not Available should be used when indicating the session could not be provided as scheduled. Student Absence or Provider Absence should be used when indicating the student or provider, respectively, was not in school that day.
  - b. The **Provider** field will auto-populate with the name of the provider recording attendance.
  - c. Select the **Actual Ratio**.
  - d. The **Quantity/Day** will default to 1 and is to designate the number of sessions provided. This number should never be changed.
  - e. Select the **Setting**. A drop down menu of all Recommended Schools will display; the default is the Recommended School on the student's current document. Choose the school where the service is delivered.
    - i. The following choices will also be available:
      1. Home
      2. Hospital or Other Non-School
      3. Preschool Itinerant Services Only
      4. Private Provider Agency
      5. Student is Parentally Placed in a Non-Public School
      6. Other

**NOTE:** If Other is selected, a new text box will display, entitled **Other Setting**. Type in the name of the school, agency or setting in which the service was provided.

The screenshot shows a form with the following fields and values:





- Log Type:** Service Provided
- Provider:** McCormick, Maryanne
- Ratio\*:** 5:1
- Quantity/Day:** 1
- Setting:** Other
- Other Setting:** (highlighted in yellow)
- Session Start:** [ ] [ ] AM
- Session End:** [ ] [ ] AM
- Calculated Duration in Minutes\*\*:** 30 mins
- Duration\*\*:** 30 mins
- CPT Code (1):** [ ] [Click here to select](#) **CPT Units:** [ ]
- CPT Code (2):** [ ] [Click here to select](#) **CPT Units:** [ ]

- f. 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 and the duration field will then become disabled.
  - i. A value should **NOT** be selected from the Duration field dropdown unless recording a service that is **not** Medicaid claimable.

- g. Select the **CPT Code (1)** by clicking the link to the right of the text box and choosing the appropriate code from the list. If the session involved using more than 1 procedure, click the link to the right of the **CPT Code (2)** field.
  - h. Select the number of **CPT Units** based on the Calculated Duration and the Session Time specified for each selected CPT Code.
5. To add the Date of Service, click **on the number** for the first day of service for the month. This will highlight the date in gold on the calendar and enter 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: Entering multiple dates of attendance is only recommended when recording attendance for those related services that are NOT Medicaid reimbursable.**

- 6. When all information has been entered, click Add. The Related Service Log entries will list at the bottom of the screen. Click Save to save entries.
- 7. To enter Session Notes, click the notepad icon to the left of the Provider e-Signature column. To view the current Goals and/or Objectives for the student, click the link for Goals and Objectives, as seen below (highlighted).


Related Services Log Entries - February 2012 (Filtered by Permissions)													View Goals & Objectives
Date	Code	Units	Service Name	Qty	Ratio	Duration	Log Type	Provider	Notes	e-Signature	USO/UDO	Notes	Sign Fill
2/17/2012	97533	2	Occupational Therapy	1	1:1	30 mins	Service Provided	McCormick, Maryanne					N/A
2/21/2012	97532	2	Occupational Therapy	1	1:1	30 mins	Service Provided	McCormick, Maryanne					N/A

- 8. Enter notes in the pop up window and click **Save** to save the notes or **Cancel** to return to the Related Service Log. If allowable by district, click the checkbox for “Session notes on file”, if keeping session notes in another format (i.e.- paper/pen).





**Occupational Therapy (2/17/2012)**

Session notes on file

Notes:

ABC 

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

Related Services Log Entries - February 2012 (Filtered by Permissions)													View Goals & Objectives
Date	Code	Units	Service Name	Qty	Ratio	Duration	Log Type	Provider	Notes	e-Signature	USO/UDO	Notes	Sign Fill
2/17/2012	97533	2	Occupational Therapy	1	1:1	30 mins	Service Provided	McCormick, Maryanne					N/A
2/21/2012	97532	2	Occupational Therapy	1	1:1	30 mins	Service Provided	McCormick, Maryanne					N/A



10. To sign an attendance entry, click the pen nib icon. The following pop up message will appear:



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

11. After the attendance entry is signed, the pen nib 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.

**Notes:** 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.

### **Adding an Entry for other Related Services (Music Therapy, Parent Counseling and Training, etc.)**

1. Click the black button ■ to view the finalized document for the student. To add Related Service Log attendance for a student, place the mouse pointer over Log Entries to expand the menu, and then click the Related Service Log link.
2. To add attendance, select the Related Service from the IEP Related Service drop down menu, ensuring that the date range 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.
3. Next, to the left of the calendar:
  - a. Select the appropriate Log Type (i.e., Service Provided, Student Absence, etc.).

- b. The Provider field will auto-populate with the name of the provider recording attendance.
- c. Select the Actual Ratio.
- d. The Quantity/Day will default to 1 and is to designate the number of sessions provided. This number should never be changed.
- e. Select the Setting. A drop down menu of all Recommended Schools will display; the default is the Recommended School on the student's current document. Choose the school where the service is delivered.
- The following choices will also be available:
    - Home
    - Hospital or Other Non-School
    - Preschool Itinerant Services Only
    - Private Provider Agency
    - Student is Parentally Placed in a Non-Public School
    - Other
- NOTE:** If Other is selected, a new text box will display, entitled Other Setting. Type in the name of the school, agency or setting in which the service was provided.
- f. Skip the Start/End Time fields. The Duration drop down menu is enabled to make a selection.
10. To add the Date of Service, click on the number for the first day of service for the month on the calendar in the middle of the screen. This will highlight the date in orange 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.
11. When all information has been entered, click Add. The Related Service Log entries will then be listed at the bottom of the screen.
12. To enter Session Notes, click the notepad icon to the left of the Provider e-Signature column. To view the current Goals and/or Objectives for the student, click the link.
13. **Optional:** Enter notes in the pop up window and click Save to save the notes or Cancel to return to the Related Service Log. If allowable by district, click the checkbox for "Session notes on file", if keeping any session notes in another format (i.e.- paper/pen).

14. Once the notes are saved, the will turn gold. To view or edit daily notes, click the notepad icon. Notes may be edited until such time as the entry has been electronically signed.
15. Click Save to save the entry(ies).

### Deleting or Invalidating an Entry

Medicaid states that electronic records can be kept provided that "...the electronic record is the original record and has not been altered or, if altered, shows the original and altered version, dates of creation and creator".

To comply with the requirement, deletion of entries will be permitted only for those RS Log entries that have not been saved.

Once saved, the entry may only be "invalidated". The invalidated record will be treated the same as a deleted record (will **not** be included for importing and reporting) but will display in the invalidation history tab which is visible in the Related Services Log in Frontline.

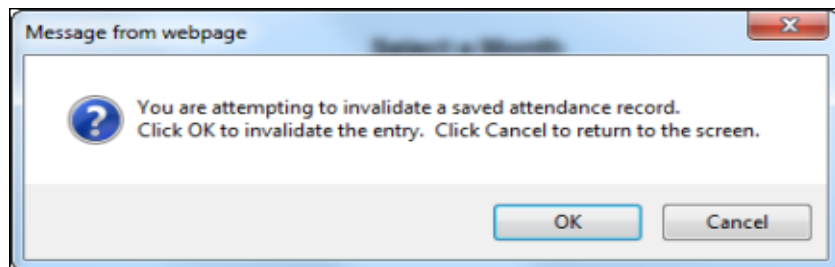
1. To delete an entry, click the delete X to the left of the unsaved entry.

Related Services Log Entries - September 2011 (Filtered by Permissions)														
	Date	Code	Units	Service Name	Qty	Ratio	Duration	Log Type	Provider	Notes	e-Signature	USO/UDO	Notes	Sign All
X	9/12/2011	97537	2	Occupational Therapy	1	1:1	35 mins	Service Provided	Gavin, Maureen					N/A
⊘	9/13/2011	97535	2	Occupational Therapy	1	1:1	30 mins	Service Provided	Gavin, Maureen					N/A

2. To invalidate an entry, click the invalidate button, to the left of the saved entry.

Related Services Log Entries - September 2011 (Filtered by Permissions)														
	Date	Code	Units	Service Name	Qty	Ratio	Duration	Log Type	Provider	Notes	e-Sig			
⊘	9/13/2011	97535	2	Occupational Therapy	1	1:1	30 mins	Service Provided	Gavin, Maureen					

3. Once the entry has been marked as invalid, the following warning message appears:



Clicking OK will invalidate the entry and remove it from the RS Log screen. Click Save.

To view any invalid entries, click the invalidate button on the upper right corner of the entry detail section at the bottom of the RS Log edit screen. The invalid entries will display in a pop up window as seen below:

Related Services Log Entries - January 2012 (Filtered by Permissions)													
Date	Code	Units	Service Name	Qty	Ratio	Duration	Log Type	Provider	Notes	e-Signature	USO/UDO	Notes	Sign Off
1/31/2012	92508	1	Speech/Language Therapy	1	3:1	30 mins	Service Provided	Speech, Sally				N/A	

Notes: In order to enter attendance in a student's Related Service Log, the student MUST have:

- a finalized document in the selected school year
- 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 Frontline 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 use

## Letters/Reports

The following reports related to RS Log are available on the Letters & Reports page of Frontline 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 Check sheet (In-District Services)**
- **Report - RS Medicaid Compliance Check sheet (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**

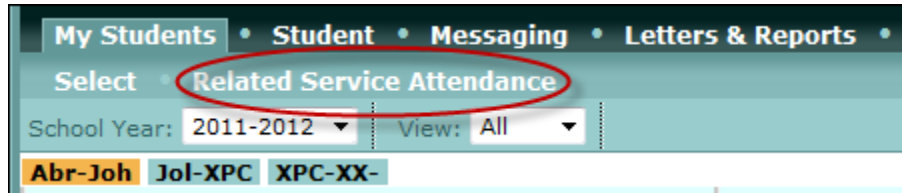
If unable to access a report on the Letters & Reports screen, please contact the district **Central Office**.

## My Related Service Attendance Wizard

(For use in entering RS Attendance for multiple students)

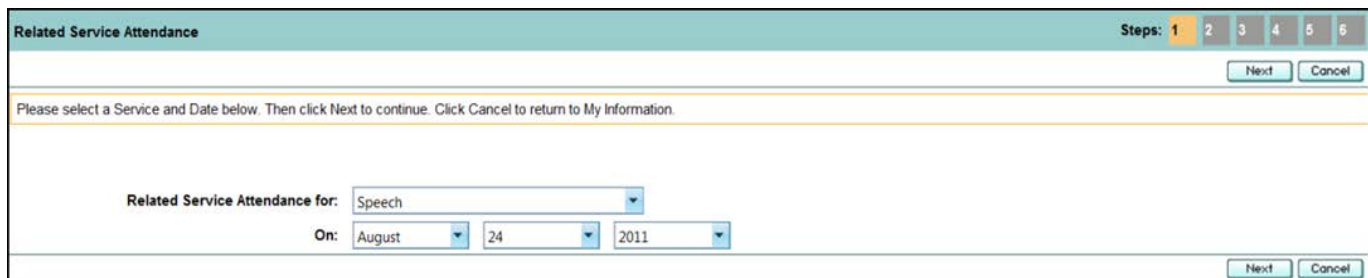
### Adding Entries for Medicaid Eligible services (Speech, OT, PT, etc.)

1. Click on Related Service Attendance, under the My Students tab, next to Select as seen below.



*Note: The Related Service Attendance link will only be accessible to users who have been identified as a Provider, have been assigned Related Service Group Access, have Credentials specified and their Electronic Signature enabled.*

2. To add attendance, select the Service and the Month/Day/Year for which attendance is being recorded. If default values are correct, service and date do not need to be selected.

A screenshot of the 'Related Service Attendance' form. The form has a title bar with 'Steps: 1 2 3 4 5 6' and 'Next' and 'Cancel' buttons. Below the title bar is a message: 'Please select a Service and Date below. Then click Next to continue. Click Cancel to return to My Information.' The form contains a dropdown menu for 'Related Service Attendance for:' with 'Speech' selected. Below this is a date selection area with 'On:' followed by three dropdown menus: 'August', '24', and '2011'. At the bottom right, there are 'Next' and 'Cancel' buttons.

3. Click Next.
  - Students for whom attendance may be taken for the selected service on the selected date will display. To be included in the list, the student must have an active, finalized IEP on the selected date and the document must have at least one active row of the selected service.
4. A series of radio buttons are available to indicate an Attendance Type for each student on the selected date. Attendance Types include:
  - Service Provided (SP)
  - Student Not Available (SNA)
  - Student Absence (SA)
  - Provider Not Available (PNA)
  - Provider Absence (PA)
  - School Closed (SC)
  - Not Scheduled (NS)

**NOTE:** Student Not Available or Provider Not Available should be used when indicating the session could not be provided as scheduled.

Student Absent or Provider Absence should be used when indicating the student or provider, respectively, was not in school that day.

5. Select the appropriate Attendance Type for each student.

- The default Attendance Type is *Not Scheduled*; if the student is not scheduled for service on the selected date, the attendance type should remain set to the default. If the date selected is a school holiday, date of closing or a weekend day, all students will default to *School Closed*; if the student did not receive services on that date, the attendance type should remain set to the default.

*More details about the specific service from each student's IEP (Service Delivery, Frequency, Period, and Duration) display to the right of the radio buttons.*

6. Click Next.

7. Record session information that is common to all of the students that were selected in Step 2 with an attendance type of *Service Provided*.

Please enter any session information that is common to all the selected students for recording their attendance. This information will be used to create the attendance entries in the RS Log for the students you selected in Step 2. You will be able to edit this information for any of these students in Step 4.

Click "Next" to record additional information for each student's session. To change the selected service or date, click "Step 1". Click "Step 2" to change the attendance type chosen for selected students. To exit the Wizard and return to the My Information tab click Cancel.

To record session information for a group of students, please make additional selections here.

Setting:	Rockyville High School	Qty:	1	
Actual Ratio:	3:1	End Time:	10 40 AM	Duration: 30 min
Start Time:	10 10 AM	CPT Units:	1	
CPT Code (1):	97150	CPT Units:		
CPT Code (2):		CPT Units:		
CPT Code (3):		CPT Units:		
CPT Code (4):		CPT Units:		

SP - Service Provided    SNA - Student Not Available    PNA - Provider Not Available    SC - School Closed    NS - Not Scheduled

- Select the **Setting**. A drop down menu of all Recommended Schools will display. Choose the school where the service is delivered.

➤ The following choices will also be available:

- Home
- Hospital or Other Non-School
- Preschool Itinerant Services Only
- Private Provider Agency
- Student is Parentally Placed in a Non-Public School
- Other

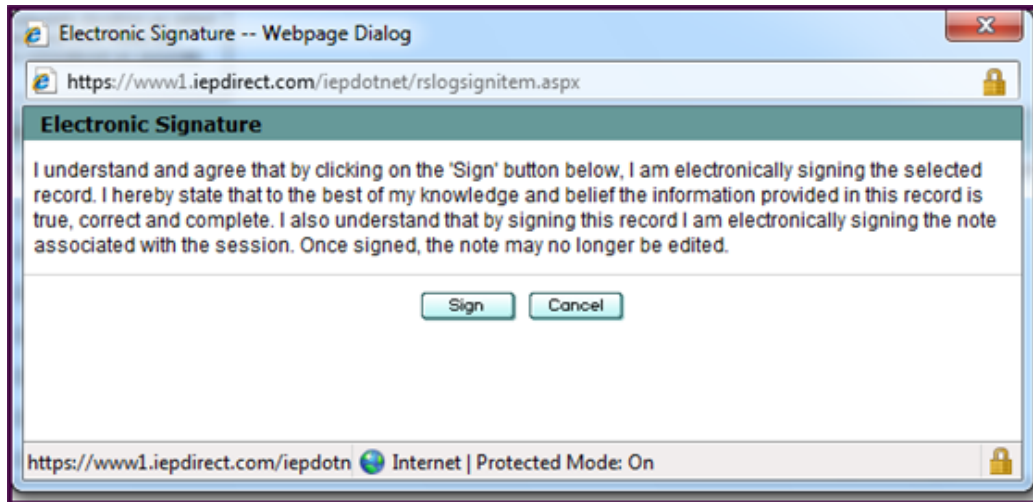
**NOTE:** If “Other” is selected, a new text box will display, entitled **Other Setting**. Type in the name of the school, agency or setting in which the service was provided.

- Select the **Actual Ratio**.
  - The **Quantity** will default to “1” and is to designate the number of sessions provided. This number should never be changed.
  - Select the **Session Start Time** and **Session End Time**. The AM/PM will default according to the time of day entered. The Duration is calculated in minutes based on the values for Start and End Times.
  - Select the **CPT Code** by clicking the link to the right of the text box and choosing the appropriate code from the list. Up to 4 codes may be selected. Select the number of **CPT Units** based on the Calculated Duration and the Session Time specified for the selected CPT Code.
8. When all information has been entered, click Next.
  9. Click the edit pencil to modify session information (Setting, Actual Ratio, Start/End Times, CPT Code and/or CPT Unit) for each individual student, if needed.
    - Enter session notes or check the box for **Session Notes on File**.
    - To view the student’s current Goals and/or Objectives, click the link, as seen below (highlighted).

The screenshot displays a form for session details. At the top, a table lists the student 'Curiel, Manjusha' with a 'Service Provided' log type, code '97150', and '1' unit. Below this, the details for 'Francis, Patricia' are shown. The 'Attendance Type' is 'Service Provided' and the 'Setting' is 'Rockyville High School'. The 'Actual Ratio' is '3:1'. The 'Start Time' is '10:10 AM' and the 'End Time' is '10:40 AM', resulting in a 'Duration: 30 min'. There are four 'CPT Code' fields, each with a 'Click here to select' link. The first 'CPT Code' field contains '97150' and '1' 'CPT Units'. A checkbox for 'Session notes on file' is checked. A yellow button labeled 'View Goals & Objectives' is visible in the bottom right corner of the form area.

10. Click Next to save changes and review the session information for all students for whom the service was provided.
11. Step 5 allows the Provider to review the session information for all students for whom the service was provided.
  - If changes need to be made, click Back to modify attendance for any of the students.

- If all Session information is correct, click Submit to continue to Step 6, the final step of the Wizard.
12. To sign all attendance entries simultaneously, click Sign All. Click the pen nib to sign entries for individual students.
- The following pop up message will appear after clicking Sign All or the pen nib:

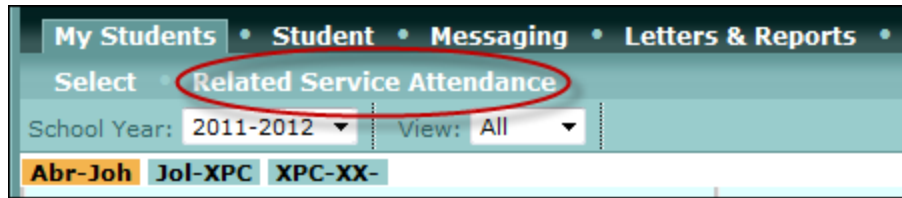


- Once signed, the session note **may not** be edited in any way. Click the **Sign** button to electronically sign, or click **Cancel** to return to the Related Service wizard Step 6 screen.
  - After the attendance entry is signed, the pen nib will turn yellow. Hovering over the pen nib will provide 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 will need to enter each student's Related Service Log; they may **NOT** use the Group Attendance feature to review or sign entries.
13. Click Finish. Entries will now appear in each student's Related Service Log. The Group Attendance process is now complete.
14. To review attendance that has been recorded, click on the My Related Service Attendance link. Select the Service and the Month/Day/Year for which attendance was recorded. If default values are correct, service and date do not need to be selected.

### **Adding an Entry for a non-Medicaid Eligible Service (Music Therapy, Parent Counseling and Training, etc.)**

1. Click on Related Service Attendance, under the My Students tab, next to Select as seen below.





**Note:** The Related Service Attendance link will only be accessible to users who have been identified as a Provider, have been assigned Related Service Group Access, and have Credentials specified in Manage Users.

2. To add attendance, select the Service and the Month/Day/Year for which attendance is being recorded. If default values are correct, service and date do not need to be selected.
3. Click Next.
  - a. Students for whom attendance may be taken for the selected service on the selected date will display. To be included in the list, the student must have an active, finalized IEP on the selected date and the document must have at least one active row of the selected service.
  - b. **Note:** All non-Medicaid eligible services will display; be sure to choose those students and services that pertain to your caseload and service type.
4. A series of radio buttons are available to indicate an Attendance Type for each student on the selected date. Attendance Types include:
  - a. Service Provided (SP)
  - b. Student Not Available (SNA)
  - c. Student Absence (SA)
  - d. Provider Not Available (PNA)
  - e. Provider Absence (PA)
  - f. School Closed (SC)
  - g. Not Scheduled (NS)
5. Select the appropriate Attendance Type for each student.
  - a. The default Attendance Type is *Not Scheduled*; if the student is not scheduled for service on the selected date, the attendance type should remain set to the default. If the date selected is a school holiday, date of closing or a weekend day, all students will default to *School Closed*; if the student did not receive services on that date, the attendance type should remain set to the default.

*More details about the specific service from each student's IEP (Service Delivery, Frequency, Period, and Duration) display to the right of the radio buttons.*
6. Click Next.
7. Record session information that is common to the students that were selected in Step 2 with an attendance type of *Service Provided*. CPT Code and CPT Unit fields may be left blank.

- a. Select the **Setting**. A drop down menu of all Recommended Schools will display. Choose the school where the service is delivered.

- i. The following choices will also be available:

- 1. Home
    - 2. Hospital or Other Non-School
    - 3. Preschool Itinerant Services Only
    - 4. Private Provider Agency
    - 5. Student is Parentally Placed in a Non-Public School
    - 6. Other

**NOTE:** If “Other” is selected, a new text box will display, entitled **Other Setting**. Type in the name of the school, agency or setting in which the service was provided.

- b. Select the **Actual Ratio**.
      - c. The **Quantity** will default to “1” and is to designate the number of sessions provided. This number should never be changed.
      - d. Select the **Session Start Time** and **Session End Time**. The AM/PM will default according to the time of day entered. The Duration is calculated in minutes based on the values for Start and End Times.

8. When all information has been entered, click Next.

9. Click the edit pencil to modify session information (Setting, Actual Ratio, Start/End Times) for individual students, if needed. Complete all students.

- a. Enter session notes or check the box for **Session Notes on File**. Entering Session Notes is Optional.
        - b. To view the student’s current Goals and/or Objectives, click the link, as seen below (highlighted).

The screenshot shows a web form for entering session information. On the left, there are four CPT Code fields (1-4) with a 'Click here to select' link next to each. Below them is a 'Session notes on file' checkbox. On the right, there are 'Start Time' and 'End Time' dropdown menus (10:15 AM and 10:45 AM respectively), a 'Duration: 30 min' label, and 'CPT Units' dropdown menus (1 unit selected). A yellow box highlights a 'View Goals & Objectives' link. At the bottom right, there is a small green checkmark icon.

10. Click Next to save changes and review the session information for all students for whom the service was provided.

11. Step 5 allows the Provider to review the session information for all students for whom the service was provided.
  - If changes need to be made, click Back to modify attendance for any of the students.
  - If all Session information is correct, click Submit to continue to Step 6, the final step of the Wizard.
12. Click Finish. Entries will now appear in each student's Related Service Log. The Group Attendance process is now complete.
13. To review attendance that has been recorded, click on the Related Service Attendance link. Select the Service and the Month/Day/Year for which attendance was recorded. If default values are correct, service and date do not need to be selected.







### Deleting or Invalidating an Entry

Medicaid states that electronic records can be kept provided that "...the electronic record is the original record and has not been altered or, if altered, shows the original and altered version, dates of creation and creator".



To comply with the requirement, deletion of entries will be permitted only for those RS Log entries that have not been saved. An unsaved entry is one that has not been electronically signed yet.

Once saved, the entry may only be "invalidated". The invalidated record will be treated the same as a deleted record (will **not** be included for importing and reporting) but will still display on the screen.

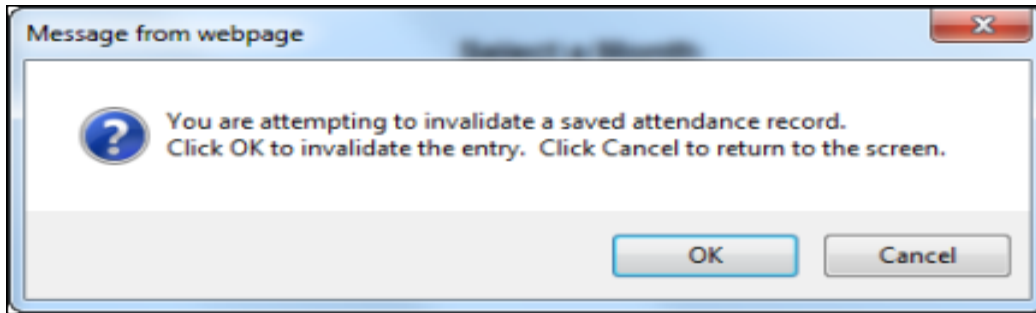
1. To delete an entry, click on the delete X to the left of the unsaved entry.

Related Services Log Entries - September 2011 (Filtered by Permissions)														
	Date	Code	Units	Service Name	Qty	Ratio	Duration	Log Type	Provider	Notes	e-Signature	USO/UDO	Notes	Sign All
	9/12/2011	97537	2	Occupational Therapy	1	1:1	35 mins	Service Provided	Gavin, Maureen					N/A
	9/13/2011	97535	2	Occupational Therapy	1	1:1	30 mins	Service Provided	Gavin, Maureen					N/A

2. To invalidate an entry, click on invalidate button to the left of the saved entry.

Related Services Log Entries - September 2011 (Filtered by Permissions)													
	Date	Code	Units	Service Name	Qty	Ratio	Duration	Log Type	Provider	Notes	e-Sig		
	9/13/2011	97535	2	Occupational Therapy	1	1:1	30 mins	Service Provided	Gavin, Maureen				

3. Once the entry has been marked as invalid, the following warning message appears:



Clicking OK will invalidate the entry and remove it from the RS Log screen. Click Save.

To view any invalid entries, click invalidate button on the upper right corner of the entry detail section at the bottom of the RS Log edit screen. The invalid entries will display in a pop up window as seen below:

Related Services Log Entries - January 2012 (Filtered by Permissions)													
Date	Code	Units	Service Name	Qty	Ratio	Duration	Log Type	Provider	Notes	e-Signature	USO/IUDO	Notes	Sign Off
1/31/2012	92508	1	Speech/Language Therapy	1	3:1	30 mins	Service Provided	Speech, Sally					N/A

Notes: In order to enter attendance, the student MUST have:

- a finalized document
- related services entered on the IEP

**In order for the Related Service Provider to use the Electronic Signature feature:**

- the provider must be entered into Frontline 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 Frontline 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 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 (In-District)**
- **Report - RS Summary of Related Service Session Notes with CPT Codes (Out-of-District)**

If unable to access to a report on the Letters & Reports screen, please contact the district **Central Office**.

## ***Helpful Web Links:***

### **Updated CPT Codes:**

[http://www.oms.nysed.gov/medicaid/medicaid\\_alerts/alerts\\_2016/16\\_08\\_interim\\_process\\_cpt\\_code\\_changes\\_pt\\_ot\\_12\\_8\\_16.pdf](http://www.oms.nysed.gov/medicaid/medicaid_alerts/alerts_2016/16_08_interim_process_cpt_code_changes_pt_ot_12_8_16.pdf)

### **Medicaid FAQ's**

[http://www.oms.nysed.gov/medicaid/q\\_and\\_a/](http://www.oms.nysed.gov/medicaid/q_and_a/)

### **Medicaid Handbook**

[http://www.oms.nysed.gov/medicaid/handbook/handbook\\_8/](http://www.oms.nysed.gov/medicaid/handbook/handbook_8/)

### **Annual Medicaid Training Materials**

[http://www.oms.nysed.gov/medicaid/training\\_materials/home.html](http://www.oms.nysed.gov/medicaid/training_materials/home.html)

### **RS Log Training Manual**



IEPD\_NY\_Training  
Manual for RS Log(Pr

### **RS log Attendance Wizard**



IEP Direct NY -  
Training Manual for R

### **ICD10 website link**

<http://www.icd10data.com/>

### **Frontline (formerly Frontline)**

<https://login.frontlineeducation.com/login?signin=328d456bb17c87029645cc9914e9490f&productId=IepLegacy&clientId=StudentSolutions#/login>

### **Your professional website link**

<http://www.apa.org/>