

# Overview of EnterClaims

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## **Quick Guide: Getting Started with EnterClaims**

- Use the following quick guide to get started with EnterClaims
- If you have any questions from here, please contact the office of the agency you work with

[ ] **Check your caseload** (see page 4)

[ ] **Update your current schedule** (see page 6)

[ ] **Enter your first week's attendance**

- Therapists – We suggest using the Weekly Calendar Attendance (see page 7)
- Coordinators – We suggest using the Monthly Calendar Attendance (see page 9)
- Teachers – We suggest using the Classroom Attendance (see page 11)

[ ] **Sign your first week's attendance** (see page 15)

[ ] **Submit your first week's attendance** (see page 19)

## Home Screen

- The EnterClaims Home Screen includes an overview of helpful information:
  - My Information
  - Alerts
  - Important Dates
  - Compliance Issues
  - My Cases
  
- My Information
  - This will list your information that the office has entered into CLAIMS, including:
    - Name
    - Address
    - Email
    - Title
    - License Number
    - License Date
    - Certification Number
    - Phone Number(s)

Phone Number	Description
(518) 555****	CEL
(518) 555****	HME

- If any information listed is incorrect, you can correct it by clicking “Edit Information”
  - This will allow you to edit the information listed for the office to review and update

- Alerts
  - The office may reach out to therapists by sending information through alerts
  - You will see a message “You have new alerts!” when a new alert has been sent

- Click the alert link to view the full message

- Important Dates

- You may see important dates listed on your home screen to let you know about paperwork that is coming due or is overdue for your cases
- This includes a description of the item due, the target due date, the child and service type the item is needed for

Important Dates			
Description	Target Date	Child	Service
ProvFamAgr	2/2/2014	Mouse,Mickey	PT
ProvFamAgr	6/1/2014	Karate,Katie	PT
Progress Report Due	5/29/2015	Appleseed,Johnny	PT
Progress Report Due	5/29/2015	Appleseed,Johnny	PT
Progress Report Due	5/29/2015	Mouse,Mickey	PT
Progress Report Due	5/29/2015	Karate,Katie	PT
Progress Report Due	5/29/2015	BILELLO,KETURAH	SC
Progress Report Due	5/29/2015	Karate,Johnny	PT
Progress Report Due	5/29/2015	Donald,Duck	PT
Progress Report Due	8/10/2015	Appleseed,Johnny	PT
Progress Report Due	8/10/2015	Karate,Katie	PT

- Compliance Issues

- The Compliance Issues section shows all of your missing or expired compliance items as they are being tracked by the office

Compliance Issues		
Description	Status	Value
A TEST	Missing	
Ack1	Missing	
Ack2	Missing	
Ack3	Missing	
EI EVAL TRAINING	Missing	
EI TRAINING 1 HR	Missing	
EI TRAINING 1 HR 2014	Missing	
EI Training Hour 1 2015	Missing	
EI Training Hour 10 2015	Missing	
EI Training Hour 2 2015	Missing	
EI Training Hour 3 2015	Missing	
EI Training Hour 4 2015	Missing	
EI Training Hour 5 2015	Missing	
EI Training Hour 6 2015	Missing	
EI Training Hour 7 2015	Missing	

1 2

- My Cases

- The My Cases section will default to list all of your cases from the current and previous month

**My Cases**

Company: All Companies      From 8/1/2015      To 9/30/2015      Retrieve

Child Name	Auth #	Assignment Info	Company	
Appleseed, Johnny	RS12345678	07/01/15-08/31/15 1x30 WEEKLY IND (Related Service 30)	WCDEMO	Attendance
Appleseed, Johnny	RS12345678	07/01/15-08/31/15 1x30 WEEKLY IND (Related Service 30)	WCDEMO	Attendance
Doodles, DeeDee	1111111	04/01/15-10/01/15 90x15 TOTAL IND	WCDEMO	Attendance
Karate, Katie		06/01/15-12/01/15 2x45 WEEKLY IND	WCDEMO	Attendance
Karate, Katie		08/01/15-08/31/15 1x30 WEEKLY IND	WCDEMO	Attendance

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- To view Child Details, click a child's name
  - The Child Details screen includes Child Information, Guardian Information, and a list of the child's therapies

## Child Details

### Child Info

Name: Johnny Appleseed	DOB: 7/1/2011
Address: 123 Main St Woodmere, NY 11598	EIP Number: Phone Number: unlisted

### Guardian Info

Guardians Unknown
-------------------

### Therapy List / History

Show only therapies assigned to me

Start Date	End Date	Service Type	Auth #	Frequency	Company	Attendance	View Reports
9/3/2014	6/19/2015	PT	RS987654321	2x30 WEEKLY	WCDEMO	Attendance	View Reports
9/3/2014	6/19/2015	PT		2x60 WEEKLY	WCDEMO	Attendance	View Reports

- To view Therapy Details, click the Assignment Info for a case
  - The Therapy Details screen includes specific therapy information such as dates, program, service type, and session frequency, important dates, and goals for that case
  - You can also set Default CPT codes for each case
    - ❖ These CPT codes will default onto all new attendances for this case

### Therapy Details

< Previous Therapy
Johnny Appleseed
Next Therapy >

Start: 07/01/15  
End: 08/31/15  
Program: PS  
Service: PT - IND  
Freq: 2x30 WEEKLY  
Desc: Related Service 30  
Auth: RS12345678  
Remaining Sessions: -33  
Weekly Calendar Color: ■

Makeups Allowed (WEEKLY): 1  
Makeups Allowed per Therapy: 5  
Total Visits Allowed per Day: 1

**Therapist**  
DONNAVIN ARMOUR  
DONNAVIN ARMOUR

**Phone #**  
(518) 555\*\*\*\*  
(518) 555\*\*\*\*

**Email**  
DONNAVIN.ARMOUR@FabulousKi.com  
DONNAVIN.ARMOUR@FabulousKi.com

**Default CPT Codes:**

CPT Code	Description	
97110	Therapeutic procedure, one or more areas, each 15 minutes (strength, endurance, ROM, flexibility)	Delete

Add CPT Code:

**Goals:**

Goal	Description	Last Updated
1	Johnny will pull self to standing position with minimal assistance.	8/3/2015 9:00:00 AM
2	Johnny will walk up and down a flight of stairs with minimal assistance.	

**Important Dates**

Description	Target Date	Actual Date	Therapist (if applicable)	Notes
Data Entry Complete				
Progress Report Due	8/10/2015		ARMOUR, DONNAVIN	

- ❖ To add default CPT codes to a case, select the CPT code from the drop-down menu and click "Add"

### Default CPT Codes:

CPT Code	Description	
97110	Therapeutic procedure, one or more areas, each 15 minutes (strength, endurance, ROM, flexibility)	Delete

Add CPT Code:

## Creating a Schedule

- To create a schedule, go to Therapist > Weekly Calendar Schedule

The screenshot shows a navigation menu with 'Therapist' highlighted. A dropdown menu is open, listing options like 'Schedule', 'Demographics', 'Weekly Attendance', 'Classroom Attendance', 'Group Attendance', 'Weekly Calendar Attendance', and 'Weekly Calendar Schedule' (which is highlighted with a red box). Below the menu is a table of 'Important Dates'.

Description	Target Date	Child	Service
ProvFamAgr	7/2/2014	Mouse, Mickey	PT
ProvFamAgr	7/1/2014	Karate, Katie	PT
Progress Re	7/29/2015	Appleseed, Johnny	PT
Progress Re	7/29/2015	Appleseed, Johnny	PT
Progress Re	7/29/2015	Mouse, Mickey	PT
Progress Re	7/29/2015	Karate, Katie	PT
Progress Report Due	7/29/2015	BILELLO, KETURAH	SC

- To schedule cases on the Weekly Calendar Schedule screen
  - Select a child and an enrollment from the drop-down menus

## Weekly Calendar - Schedule Mode

The screenshot shows the header of the 'Weekly Calendar - Schedule Mode' interface. It includes a 'Jump To:' field set to '07/05/15'. Below it, there are two dropdown menus: the first is set to 'Appleseed, Johnny' and the second is set to 'PT 07/01/15-08/31/15 1x30 WEEKLY IND - Related Service 30 - CHILD'S HOM'.

- Click the time-slots on the calendar where that case should be scheduled
- To schedule time that you will be unavailable, select "Unavailable, Time" from the child drop-down and click on the calendar to set this time aside
- Click "Save" to save changes to your schedule

## Weekly Calendar - Schedule Mode

The screenshot shows the main calendar view. At the top, it says 'Unsaved Changes Exist' and 'Jump To: 07/05/15'. Below that, there is a dropdown menu set to 'Unavailable, Time' and a '60 min' duration field. A 'Save' button is highlighted with a red box. The calendar itself shows the week of July 5, 2015, to July 11, 2015. The time slots range from 8 AM to 1 PM. Scheduled events are shown as colored blocks: PT sessions for Johnny Appleseed and Katie Karate. Unavailable times are shown as dark blue blocks labeled 'UNAVAILABLE IND Time Unavailable'.

## Entering Attendance

- There are a few screens that you can use to enter attendance in EnterClaims:
  - Weekly Calendar Attendance
  - Monthly Calendar Attendance
  - Classroom Attendance
  - Single Attendance
- Weekly Calendar Attendance
  - This attendance entry screen displays a weekly calendar where attendance can be entered and edited
  - To get to the Weekly Calendar Attendance screen, go to Therapist > Weekly Calendar Attendance

The screenshot shows a navigation menu with the following items: Home, Therapist (highlighted), Billing, Payments, Maintenance, Help, and Exit. Under the 'Therapist' menu, the following options are listed: Schedule, Demographics, Weekly Attendance, Classroom Attendance, Group Attendance, and Weekly Calendar Attendance (highlighted). Below the menu is a section for 'Important Dates' with a table of scheduled events.

Description	Target Date	Child	Service
ProvFamAgr	7/2/2014	Mouse,Mickey	PT
ProvFamAgr	7/1/2014	Karate,Katie	PT
Progress Re	7/29/2015	Appleseed,Johnny	PT
Progress Re	7/29/2015	Appleseed,Johnny	PT
Progress Re	7/29/2015	Mouse,Mickey	PT
Progress Re	7/29/2015	Karate,Katie	PT

- On the Weekly Calendar Attendance screen, there are two ways to enter attendance:
  - Fill From Schedule
    - ❖ To do this, click “Fill From Schedule”
    - ❖ This will fill all scheduled attendances that apply onto that week based on what you have entered in the Weekly Calendar Schedule

The screenshot shows the 'Weekly Calendar - Attendance Mode' interface. At the top, there is a notification 'Unsaved Changes Exist' and a 'Jump To: 07/26/15' field. Below this, there are dropdown menus for patient selection (Appleseed, Johnny), service type (PT 07/01/15-07/31/15 2x60 WEEKLY IND - Related Service 30 - CHILD'S HOME), and therapy ICD codes (F89 - Unsp). There are also fields for 'Code: P' and '60 min'. A 'Save' button and a 'Fill From Schedule' button (highlighted with a red box) are visible. Below the form is a calendar grid for the week of July 26, 2015, to August 01, 2015. The grid shows scheduled appointments for Monday, Tuesday, and Wednesday.

	Sunday Jul 26, 2015	Monday Jul 27, 2015	Tuesday Jul 28, 2015	Wednesday Jul 29, 2015	Thursday Jul 30, 2015
8AM					
9AM		PT IND Johnny,Appleseed			
10AM		PT IND Katie Karate		PT IND Katie Karate	
11AM					

- Enter Attendance
  - ❖ To do this, click the time-slot on the calendar to enter an attendance

- Add/Edit Attendance Entry
  - To enter attendance details, click the attendance on the calendar to pull up the Add/Edit Attendance Entry screen
  - In the Add/Edit Attendance screen, update any fields that you need to track for treatment, including:
    - ❖ Start and End Time
    - ❖ Attendance Type Code (P, CA, TA, etc.)
      - If an MU type code is selected, a Makeup For Date can be entered based on previously entered absences for the same case
    - ❖ Parent Present and Parent Communication, if applicable
    - ❖ CPT Codes, including the appropriate number of timed CPT codes
    - ❖ Session Notes
    - ❖ Goals, if applicable
    - ❖ Session Progress, if applicable
    - ❖ Response, if applicable
  - Click “Update” to save changes or “Remove” to remove the attendance

**Add/Edit Attendance Entry** ✕

Add Appleseed, Johnny - PT 2x60 WEEKLY IND

Service Date:   Makeup For:

Johnny Appleseed - PT 1x30 WEEKLY IND

Start Time:   End Time:   Type Code:

Parent Present  Parent Communication

**1 Assigned CPT Codes (Click to hide)**

Code	Description	
97110	Therapeutic procedure, one or more areas, each 15 minutes (strength, endurance, ROM, flexibility)	<input type="button" value="Delete"/>
+ Add Available CPT Code <input type="text" value="97001 - Physical therapy evaluation"/>		

**Notes:**  

Worked on Johnny's ability to stand from a sitting position. Today he struggled with pushing off the floor to stand

**1 Assigned Goals (Click to view)**

Response:  Session Progress:

Johnny made some improvements, but could still work on pushing up from the floor



- Attendance Warnings
  - If there are potential problems with attendances being entered, EnterClaims will give attendance warnings when you save on an attendance entry screen
    - Potential problems include being over session frequency, under session frequency, time conflicts between cases or with other therapists for the same child, etc.
  - These warnings will need to be checked over and OK'd before attendances can be saved

Weekly Calendar - Attendance Mode

**Unsaved Changes Exist** Jump To: 07/26/15

Appleseed, Johnny  
 PT 07/01/15-07/31/15 2x60 WEEKLY IND - Related Service 30 - CHILD'S HOME  
 Therapy ICD Codes: F89 - Uns  
 Code: P 60 min  
 1 Default CPT Codes (Click to view)

Save Fill From Schedule

Conflicts encountered. You must either check off the conflict to bypass it or fix it if bypassing is not an option.

You are under the session frequency for service PT for child Appleseed, Johnny. You have entered 1, the frequency is 2x30 WEEKLY  
 You are over the session frequency for service PT for child Karate, Katie. You have entered 3, the frequency is 2x45 WEEKLY  
 Attendance for Johnny Appleseed on Monday from 9:00 AM to 9:30 AM overlaps with attendance they have for NORTON, EMANI

OK with Warnings Cancel

- Monthly Calendar Attendance

- The Monthly Calendar Attendance screen can be opened in two ways:
  - On the Home Screen under My Cases, click "Attendance" on the row for a case
    - Please note, this needs to be set in the Therapist Preferences

My Cases

Company: All Companies From 8/1/2015 To 9/30/2015 Retrieve

Child Name	Auth #	Assignment Info	Company	
ABA, KAREL		06/22/15-12/22/15 10x15 TOTAL IND	WCDEMO	Attendance
Appleseed, Johnny	123456	06/01/15-12/01/15 90x15 TOTAL IND	WCDEMO	Attendance
Doodles, DeeDee	667788	04/01/15-10/01/15 90x15 TOTAL IND	WCDEMO	Attendance
ISRAR, DANA		08/05/15-02/05/16 70x15 TOTAL IND	WCDEMO	Attendance
Karate, Johnny	999999	02/05/15-08/05/15 60x15 TOTAL IND	WCDEMO	Attendance

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- On the Therapy Details screen, click "Enter Attendance"

Important Dates

Description	Target Date	Actual Date	Therapist (if applicable)	Notes
Data Entry Complete				
Progress Report Due	8/10/2015		ARMOUR, DONNAVIN	

Child File Listing  
 There are no files available for this child.

Enter Single Attendance **Enter Attendance** Progress Reports

July 2015

		1	2	3	4
5	6	7	8	9	10
11	12	13	14	15	16
17	18				

August 2015

					1
2	3	4	5	6	7
8	9	10	11	12	13
14	15				

- On the Monthly Calendar Attendance screen, there are two ways to enter attendance
  - Fill From Schedule
    - To do this, click "Fill From Schedule"
    - This will fill all scheduled attendances that apply onto that week based on what you have entered in the Weekly Calendar Schedule

< Previous Therapy **Karate, Katie** Next Therapy >

PT - IND NASSEI-NYEIS  
 2 X 45 WEEKLY  
 From: 6/1/2015 ICD Codes: F89 To: 12/1/2015

**September 2015**

< Previous Month **Fill From Schedule** Save Next Month >

**Unsaved changes exist.**

- Enter Attendance
  - ❖ To do this, click the check box in top left corner of a service date on the calendar
  - ❖ This will allow you to type in session times
  - ❖ This also enables the “Details” button, which can be clicked to open the Add/Edit Attendance Entry screen to add more information, such as:
    - Start and End Time
    - Attendance Type Code (P, CA, TA, etc.)
      - If an MU type code is selected, a Makeup For Date can be entered based on previously entered absences for the same case
    - Parent Present and Parent Communication, if applicable
    - CPT Codes, including the appropriate number of timed CPT codes
    - Session Notes
    - Goals, if applicable
    - Session Progress, if applicable
    - Response, if applicable
  - ❖ Enter additional sessions for the same child and service date by clicking “+ Attendance” at the bottom of the screen
  - ❖ Click “Update and Close” to save the attendance details

**Add/Edit Attendance Entry**

**Attendance Details**

Start Time: 8:00 AM      End Time: 8:10 AM      Type Code: TC      Makeup For: [v]

Parent Present       Parent Communication

0 Assigned CPT Codes (Click to view)

Notes:  
Spoke with mom about upcoming services for Johnny, regarding scheduling, transportation, after school, etc.

0 Assigned Goals (Click to hide)

Response:      Session Progress: [v]

[ + Attendance 2 ]  
[ + Attendance 3 ]  
[ + Attendance 4 ]

Update and Close      Cancel

- Click “Save” on the calendar to save all attendance changes and review any attendance warnings
  - ❖ For more information on attendance warnings, please see Page 7

- Classroom Attendance
  - The Classroom Attendance screen groups children by classrooms to easily enter attendance
  - To get to the Classroom Attendance screen, go to Therapist > Classroom Attendance

Description	Target Date	Child	Service
SP Prescript	/1/2015	GOMEZ, BENJAMIN	SP
SP Prescript	/1/2015	GOMEZ, BENJAMIN	SP
SP Prescript	/1/2015	LEE, SAMANTHA	SP
Progress Re	/10/2015	LEE, SAMANTHA	SP
Progress Re	/10/2015	GOMEZ, BENJAMIN	SP
Progress Re	/10/2015	LECOUR, AARIZ	SP
Progress Re	/10/2015	LECOUR, AARIZ	SP
Progress Re	/10/2015	GOMEZ, BENJAMIN	SP

- Before entering attendance, make sure the correct Start time and Duration are set for the classroom

## Classroom Attendance

**9/14/2015 - 9/18/2015**

**Demo's**

PS - TIGERS CLASSROOM - SPED

Start: 8:00 AM    Duration: 360    Type Code: CA

	Monday	Tuesday	Wednesday	Thursday	Friday

- On the Classroom Attendance screen, all attendances will default to ABSENT
- To mark all children as present for the day, click "Present" on that day

**Demo's**

PS - TIGERS CLASSROOM - SPED

Start: 8:00 AM    Duration: 360    Type Code: P

	Monday	Tuesday	Wednesday	Thursday	Friday
Appleseed, Johnny	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT
Blueberry, Sal	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT
Karate, Johnny	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT
Karate, Katie	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT
Pickles, Tommy	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT
Schultz, Charles	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT

- To mark a child with a different attendance code, select the code from the Type Code drop-down menu, then click the row for that child under the day that code should be used

**Demo's**  
 PS - TIGERS CLASSROOM - SPED Start: 8:00 AM Duration: 360 Type Code: CA

Present Present Present Present Present

	Monday	Tuesday	Wednesday	Thursday	Friday
Appleseed, Johnny	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT
Blueberry, Sal	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT
Karate, Johnny	CA	ABSENT	ABSENT	ABSENT	ABSENT
Karate, Katie	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT
Pickles, Tommy	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT
Schultz, Charles	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT

- Click "Save" to save changes

**Classroom Attendance**

< Previous Week **9/14/2015 - 9/18/2015** Next Week >

Save

**Demo's**  
 PS - TIGERS CLASSROOM - SPED Start: 8:00 AM Duration: 360 Type Code: CA

Present Present Present Present Present

	Monday	Tuesday	Wednesday	Thursday	Friday
Appleseed, Johnny	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT
Blueberry, Sal	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT
Karate, Johnny	CA	ABSENT	ABSENT	ABSENT	ABSENT
Karate, Katie	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT
Pickles, Tommy	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT
Schultz, Charles	PRESENT	ABSENT	ABSENT	ABSENT	ABSENT

- Single Attendance

- The Single Attendance screen can be opened in two ways:
  - On the Home Screen under My Cases, click "Attendance" on the row for a case
    - Please note, this needs to be set in the Therapist Preferences

**My Cases**

Company: All Companies From 8/1/2015 To 9/30/2015 Retrieve

Child Name	Auth #	Assignment Info	Company	Attendance
ABA, KAREL		06/22/15-12/22/15 10x15 TOTAL IND	WCDEMO	Attendance
Appleseed, Johnny	123456	06/01/15-12/01/15 90x15 TOTAL IND	WCDEMO	Attendance
Doodles, DeeDee	667788	04/01/15-10/01/15 90x15 TOTAL IND	WCDEMO	Attendance
ISRAR, DANA		08/05/15-02/05/16 70x15 TOTAL IND	WCDEMO	Attendance
Karate, Johnny	999999	02/05/15-08/05/15 60x15 TOTAL IND	WCDEMO	Attendance

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- On the Therapy Details screen, click "Enter Single Attendance"

**Important Dates**

Description	Target Date	Actual Date	Therapist (if applicable)	Notes
Data Entry Complete				
Progress Report Due	8/10/2015		ARMOUR, DONNAVIN	

**Child File Listing**

There are no files available for this child.

Enter Single Attendance Enter Attendance Progress Reports

July 2015

		1	2	3	4
5	6	7	8	9	10
11	12	13	14	15	16
17	18				

August 2015

					1
2	3	4	5	6	7
8	9	10	11	12	13
14	15				

- The Single Attendance screen allows you to show one attendance at a time, so that a guardian signature can be entered without showing information for other cases
- On the Single Attendance screen, you will see case information listed at the top of the screen

Home | Therapist | Billing | Payments

Attendance For: Johnny Appleseed

Start Date: 07/01/15  
 End Date: 08/31/15  
 Program: PS  
 Service: PT - IND  
 Frequency: 2x30 WEEKLY  
 Program Description: Related Service 30  
 Auth: RS12345678  
 Total Remaining Sessions: -35

Service Date: 08/31/2015

Start: 04:15 PM      End: 04:45 PM

- The next section allows the Service Date, Start and End Times, and Attendance Codes to be entered
  - If an MU type code is selected, a Makeup For Date can be entered based on previously entered absences for the same case

Home | Therapist | Billing | Payments

Attendance For: Johnny Appleseed

Start Date: 07/01/15  
 End Date: 08/31/15  
 Program: PS  
 Service: PT - IND  
 Frequency: 2x30 WEEKLY  
 Program Description: Related Service 30  
 Auth: RS12345678  
 Total Remaining Sessions: -35

Service Date: 08/31/2015

Start: 04:15 PM      End: 04:45 PM

Attendance Code: P

Makeup For:

Session Details (click to show)

Guardian Signature (click to show)

Save      Delete

- Click the Session Details section to expand this out to enter attendance details, including:
  - CPT Codes, including the appropriate number of timed CPT codes
  - Session Notes
  - Parent Present and Parent Communication, if applicable
  - Session Progress, if applicable
  - Response, if applicable
  - Goals, if applicable

Service Date: 08/31/2015

Start: 04:15 PM      End: 04:45 PM

Attendance Code: P

Makeup For:

**Session Details (click to hide)**

**1 Assigned CPT Codes (Click to view)**

Notes:

Parent Present

Parent Communication

Session Progress:

Response:

**0 Assigned Goals (Click to view)**

- Click the Guardian Signature section to expand this out to allow a guardian to sign

Service Date: 08/31/2015


Start: 04:15 PM      End: 04:45 PM

Attendance Code: P

Makeup For:

**Session Details (click to show)**

**Guardian Signature (click to hide)**



- Click "Save" to save to review attendance warnings and save
- Click "Delete" to delete the entered attendance

Attendance Code: P

Makeup For:

**Session Details (click to show)**

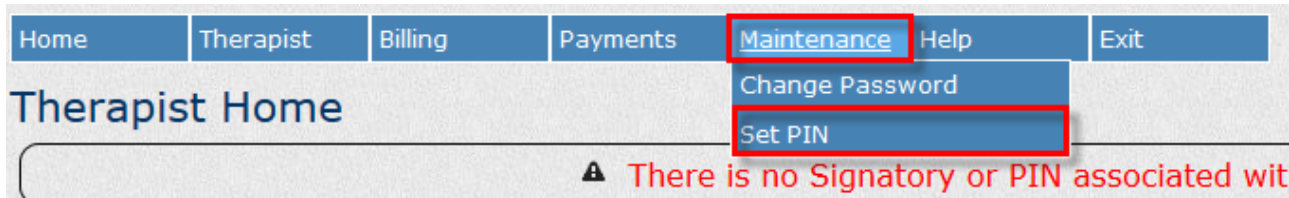
**Guardian Signature (click to show)**

## Signing Attendance

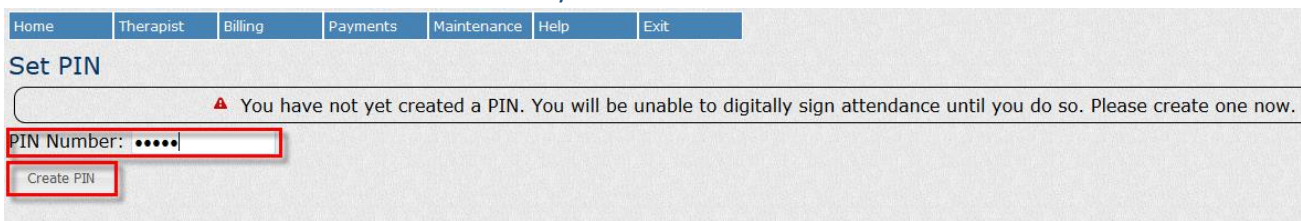
- Set PIN
  - To digitally sign attendances in EnterClaims, you will need to set a PIN for your account
  - If you do not have a PIN set for your account, you will see this alert to set your PIN



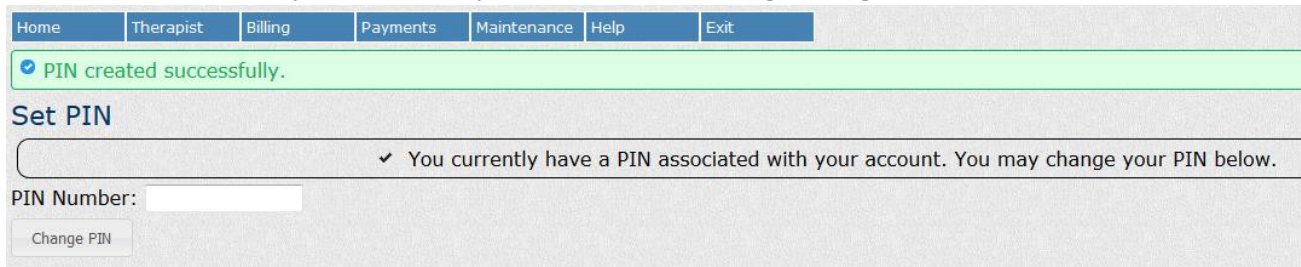
- To set a PIN:
  - Either click the “Please create your PIN now” or go to Maintenance > Set PIN



- On the Set PIN screen, type your PIN into the PIN Number field
  - There is no minimum or maximum character limit
  - Special characters can be used
- Click “Create PIN” to create your PIN

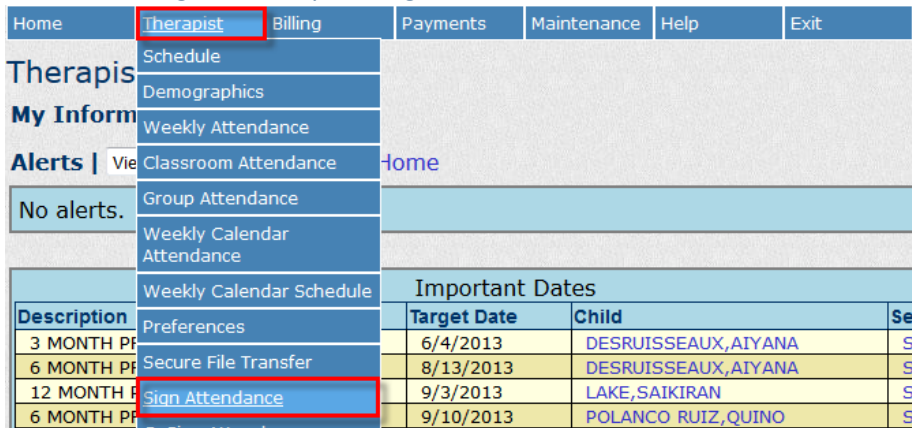


- Once your PIN is set, you will see the following message:



- Your PIN number can be updated at any time by entering a new PIN into the Set PIN screen

- Sign Attendance
  - To sign attendance, go to Therapist > Sign Attendance



- On the Sign Attendance screen, you have the option to filter by child by typing the child's last name, or by date by using the Services from filter



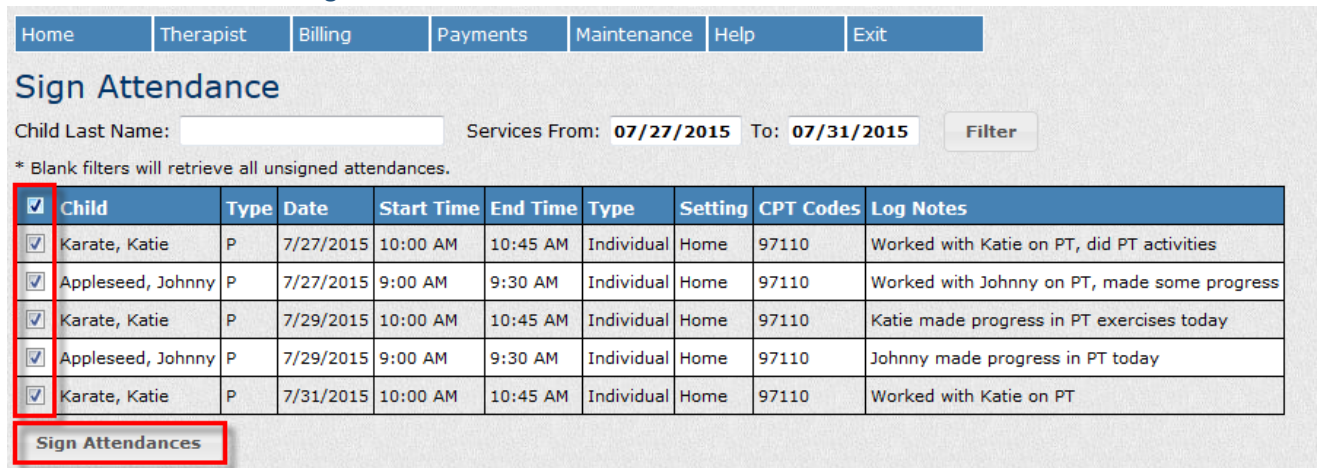
Home Therapist Billing Payments Maintenance Help Exit

## Sign Attendance

Child Last Name:  Services From: **07/27/2015** To: **07/31/2015**

\* Blank filters will retrieve all unsigned attendances.

- Attendances will be listed with all signing fields, including:
  - Child name
  - Attendance type
  - Service Date
  - Start and End Times
  - Individual or Group
  - Service Setting
  - CPT Codes
  - Log Notes
- To sign attendances:
  - Check the box next to all attendances that should be signed
    - ❖ To check off all boxes, click the check box to the left of the Child column
  - Click "Sign Attendances"



Home Therapist Billing Payments Maintenance Help Exit

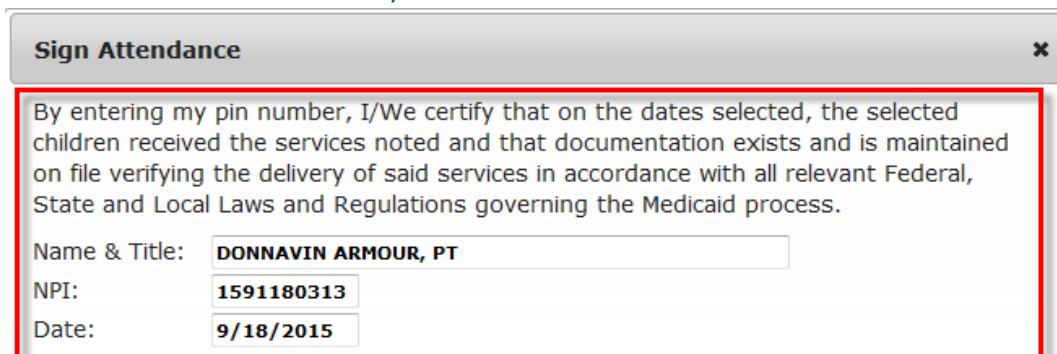
## Sign Attendance

Child Last Name:  Services From: **07/27/2015** To: **07/31/2015**

\* Blank filters will retrieve all unsigned attendances.

<input checked="" type="checkbox"/>	Child	Type	Date	Start Time	End Time	Type	Setting	CPT Codes	Log Notes
<input checked="" type="checkbox"/>	Karate, Katie	P	7/27/2015	10:00 AM	10:45 AM	Individual	Home	97110	Worked with Katie on PT, did PT activities
<input checked="" type="checkbox"/>	Appleseed, Johnny	P	7/27/2015	9:00 AM	9:30 AM	Individual	Home	97110	Worked with Johnny on PT, made some progress
<input checked="" type="checkbox"/>	Karate, Katie	P	7/29/2015	10:00 AM	10:45 AM	Individual	Home	97110	Katie made progress in PT exercises today
<input checked="" type="checkbox"/>	Appleseed, Johnny	P	7/29/2015	9:00 AM	9:30 AM	Individual	Home	97110	Johnny made progress in PT today
<input checked="" type="checkbox"/>	Karate, Katie	P	7/31/2015	10:00 AM	10:45 AM	Individual	Home	97110	Worked with Katie on PT

- On the Sign Attendance pop-up, you will see:
  - ❖ A message confirming that you certify that the signed attendances are in accordance with Medicaid regulations
  - ❖ The name and title you are signing with
  - ❖ Your NPI number
  - ❖ The date you are signing
  - ❖ A field to enter your PIN



**Sign Attendance**

By entering my pin number, I/We certify that on the dates selected, the selected children received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

Name & Title:

NPI:

Date:



- Enter your PIN and click "Sign Attendance" to finish signing

**Sign Attendance** ✕

By entering my pin number, I/We certify that on the dates selected, the selected children received the services noted and that documentation exists and is maintained on file verifying the delivery of said services in accordance with all relevant Federal, State and Local Laws and Regulations governing the Medicaid process.

Name & Title:

NPI:

Date:

PIN:

- Once your attendance is signed, you will see a message that you have signed successfully

✔ Attendances signed successfully.

**Sign Attendance**

Child Last Name:  Services From:  To:

\* Blank filters will retrieve all unsigned attendances.

You have no attendances that require signing.

- CoSign Attendance

- If you are a supervisor, you can co-sign attendances once they have been signed by the providing therapist on the CoSign Attendance screen
- To co-sign attendances, go to Therapist > CoSign Attendance

Home	Therapist	Billing	Payments	Maintenance	Help	Exit
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**Therapist**

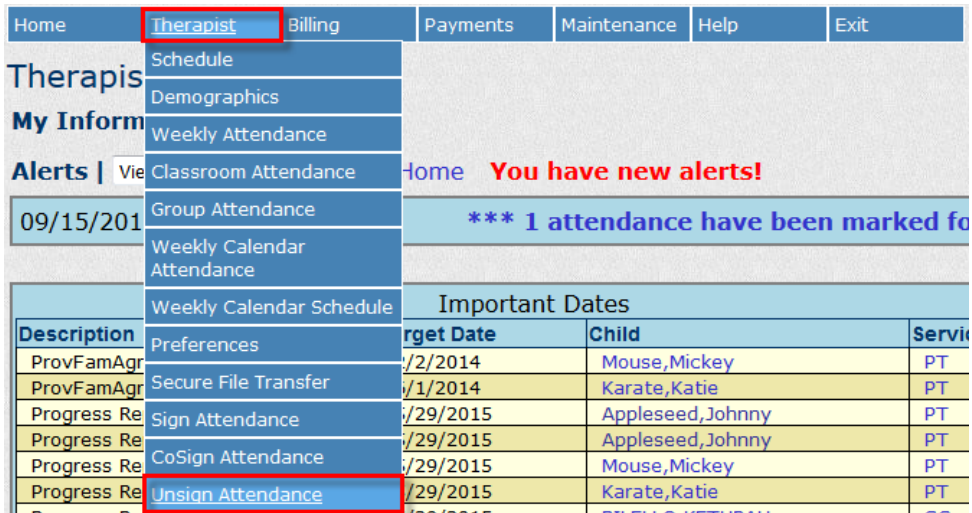
- Schedule
- Demographics
- Weekly Attendance
- Classroom Attendance
- Group Attendance
- Weekly Calendar Attendance
- Weekly Calendar Schedule
- Preferences
- Secure File Transfer
- Sign Attendance
- CoSign Attendance
- Unsign Attendance

Important Dates			
Description	Target Date	Child	Se
ProvFamAgr	5/15/2012	ABAD,ROHED	S
ProvFamAgr	5/15/2012	ABAD,ROHED	F
ProvFamAgr	11/3/2013	LERNER,ARIS	S
Progress Re	6/9/2014	ABAD,ROHED	F
Progress Re	6/9/2014	ABAD,ROHED	S
9 MONTH PR	6/16/2014	Smith,Bobby	F

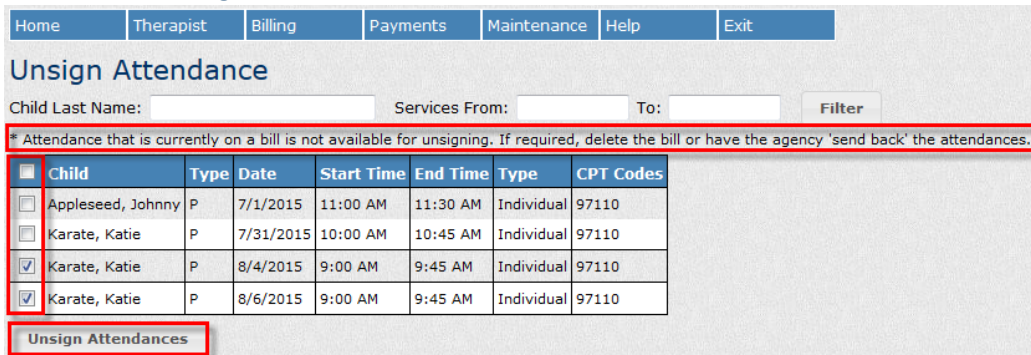
- Digital signing on the CoSign Attendance screen works the same as on the Sign Attendance screen
  - For more information on signing attendance, please see Page 15

- Unsign Attendance

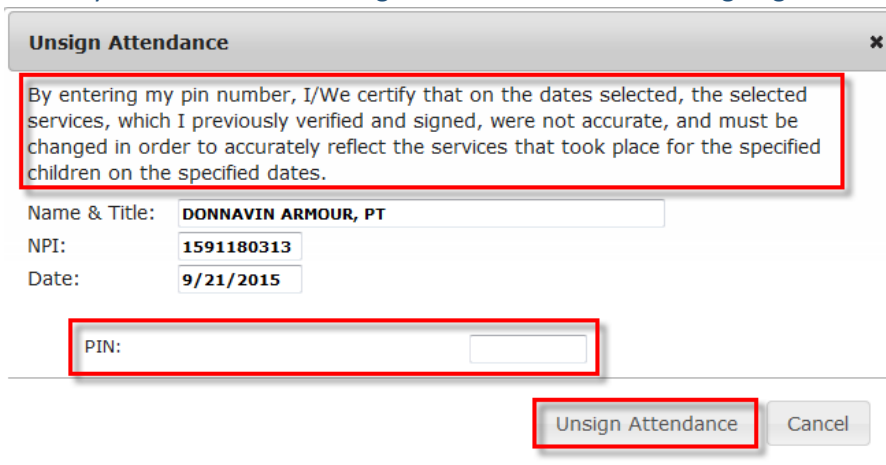
- If signed attendances need to be edited, you will first need to unsign the attendance on the Unsign Attendance screen
- To unsign attendances, go to Therapist > Unsign Attendance



- The Unsign Attendance screen lists attendances and signing fields, similar to the Sign Attendance screen
- Only attendances that are not currently submitted on a bill will be listed on this screen
- To un-sign attendances:
  - Check the box by any attendances that should be unsigned and edited
  - Click “Unsign Attendance”



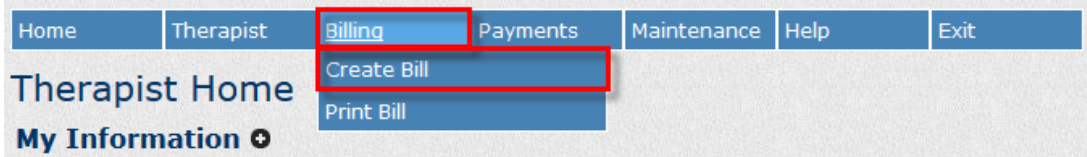
- Review the Unsign Attendance message confirming that you had signed inaccurate attendance information and need to unsign to edit that information
- Enter your PIN and click “Unsign Attendance” to finish unsigning



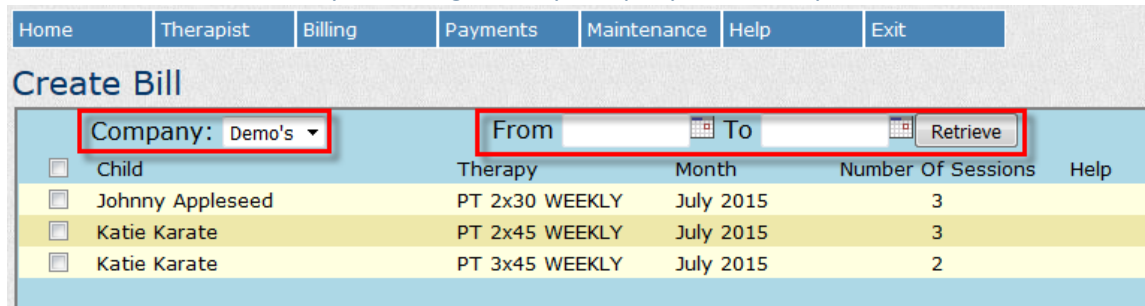
- Once your attendance is unsigned, you see a message that you have unsigned successfully and your attendance can be edited

## Submitting Attendance

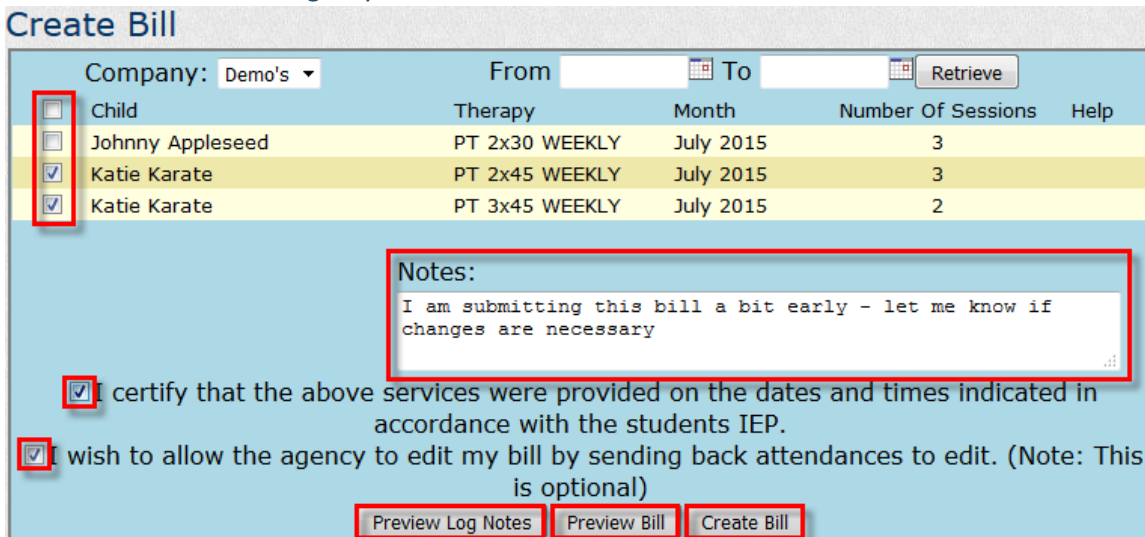
- Create Bill
  - To submit your attendance to the office, you must create a bill on the Create Bill screen
  - To create a bill, go to Billing > Create Bill



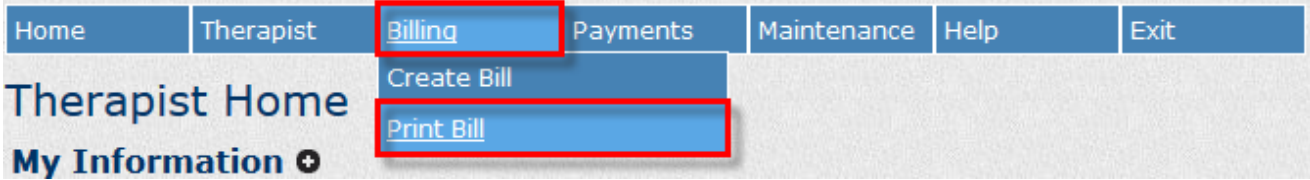
- On the Create Bill, you will see your attendances grouped by service month and by case
  - You can filter by date range and by company to narrow your results



- To create a bill:
  - Check off all cases that should be included on the bill
  - Enter any bill notes
  - Check to certify that the services provided are in accordance with the child's IEP
  - Check to allow the agency to edit your bill by sending attendances back to you to edit if necessary
    - ❖ Please note, this is optional
  - Click "Create Bill"
    - ❖ Your billed attendances will no longer be available on the Create Bill screen
    - ❖ You will see your created bill listed on the Print Bill screen
- Other options:
  - Preview Log Notes
    - ❖ This will print your attendances on applicable treatment log forms
  - Preview Bill
    - ❖ This will preview the print-out for your bill without actually submitting attendances to the agency

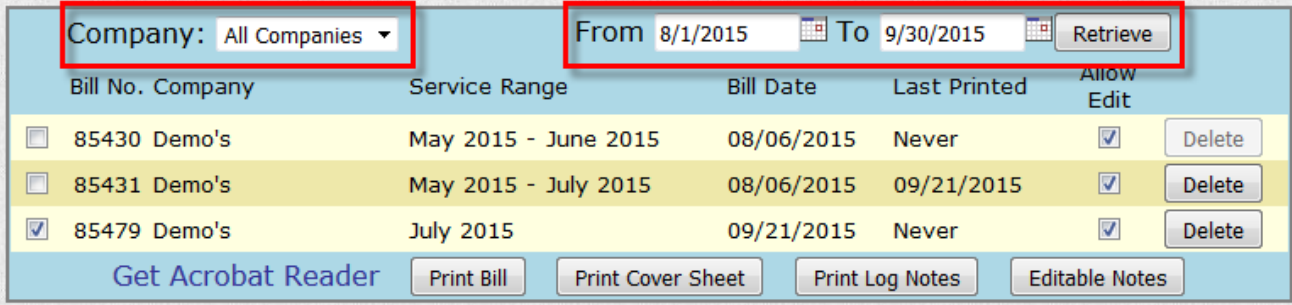


- Print Bill
  - The Print Bill screen can be used to either print or delete a bill
  - To print or delete a bill, go to Billing > Print Bill



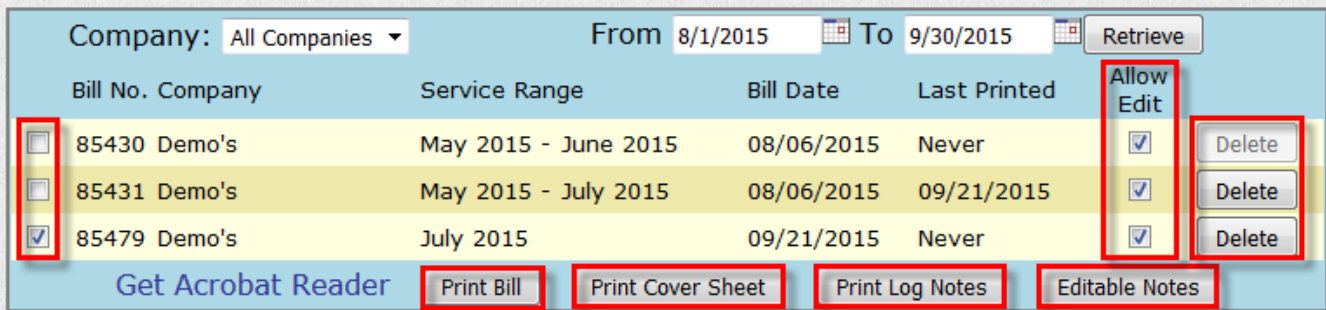
- On the Print Bill screen, you will see your created bills for the current and previous month
  - You can filter by date range and by company to narrow your results

## Print Bill



- To print a bill:
  - Check the bill you would like to print
  - Click "Print Bill"
- Other Options:
  - Print Cover Sheet
    - ❖ This will print just the first page of your bill to be turned in as a cover sheet
  - Print Log Notes
    - ❖ This will print the attendances submitted on the bill on applicable treatment logs
  - Editable Notes
    - ❖ This will open your bill in an editable Microsoft Word document
  - Delete
    - ❖ This allows you to delete a bill that has not yet been imported by the agency
  - Allow Edit
    - ❖ This allows you to mark a bill as editable after it has been submitted to the agency
    - ❖ Checking "Allow Edit" allows the agency to send back attendances to be edited

## Print Bill



## Therapist Preferences

- You can set preferences for your account to change displays on different screens in EnterClaims
- To set preferences, go to Therapist > Preferences

The screenshot shows the top navigation bar with 'Therapist' highlighted in a red box. A dropdown menu is open, listing various options: Schedule, Demographics, Weekly Attendance, Classroom Attendance, Group Attendance, Weekly Calendar Attendance, Weekly Calendar Schedule, and Preferences. 'Preferences' is also highlighted in a red box. Below the menu, there are alerts: 'You have new alerts!' and '\*\*\* 1 attendance have been marked for'. At the bottom, there is a table with columns: Description, Target Date, Child, and Service.

Description	Target Date	Child	Service
ProvFamAgr	2/2/2014	Mouse,Mickey	PT
ProvFamAgr	1/1/2014	Karate,Katie	PT
Progress Re	2/29/2015	Appleseed,Johnny	PT
Progress Re	2/29/2015	Appleseed,Johnny	PT

- The Preferences screen lists several areas where preferences can be set:
  - Area Preferences
    - ❖ In this section, you can select areas where you would prefer to work by clicking each area

The screenshot shows the 'Area Preferences' screen. On the left, a list of areas is shown under the heading 'Demo's'. The list includes: Adelphi, Albertson, Amaganset, Amityville, Astoria, and Atlantic Beach. The 'Amaganset' area is highlighted in blue. On the right, there are several checkboxes: 'Show Address' (checked), 'Show License Number' (checked), 'Show Session Times for Monthly Calendar' (checked), and 'Show Attendance Details On First Click' (unchecked). Below these is a section for 'Calendar Time:'.

- Fields from My Information on the Therapist Home screen
  - ❖ Show Address
  - ❖ Show License Number

This screenshot is similar to the previous one, showing the 'Area Preferences' screen. In this view, the 'Show Address' and 'Show License Number' checkboxes are highlighted with a red box, indicating they are the focus of the instruction.

- Show Session Times for Monthly Calendar
  - ❖ If this is checked, you are able to enter Session Times on the Monthly Calendar Attendance screen without opening the Attendance Details screen
- Show Attendance Details on First Click
  - ❖ If this is checked, the Attendance Details screen will open as soon as an attendance is added to the Weekly Calendar Attendance screen
- Calendar Time
  - ❖ This controls the minimum and maximum time that show on the Weekly Calendar Schedule and Weekly Calendar Attendance screens
- Timeout Duration
  - ❖ This allows you to set the amount of time EnterClaims can be left idle before it logs you out automatically
- Classroom Time
  - ❖ This allows you to set a default start time for the Classroom Attendance screen
- Home Screen Attendance Mode
  - ❖ This allows you to select whether the “Attendance” button in the My Cases section on the Therapist Home screen sends you to the Monthly Calendar Attendance screen or the Single Attendance screen
- Minutes per Timeslot
  - ❖ This sets the number of minutes per timeslot listed on the Weekly Calendar Schedule or Weekly Calendar Attendance screens

Home	Therapist	Billing	Payments	Maintenance	Help	Exit
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### Area Preferences

**Demo's**

< Previous Company      Next Company >

Area Description
Adelphi
Albertson
Amaganset
Amityville
Astoria
Atlantic Beach
Babylon
Baiting Hollow
Baldwin
Bath Beach
Bay Ridge
Bay Shore
Baychester
Bayport
Bayside
Bayville
Bedford Stuyvesant
Belle Harbor
Bellerose
Bellmore
Bellport
Belmont
Bensonhurst

Show Address

Show License Number

Show Session Times for Monthly Calendar

Show Attendance Details On First Click

Calendar Time:

Minimum: 8:00 AM

Maximum: 6:00 PM

Timeout Duration: 15

Classroom Time:

Start Time: 8:00 AM

Home Screen Attendance Mode: Monthly Attendance Screen

Calendar Settings:

Minutes per Timeslot: 15