SSG MAXCAPTURE
User Guide

Revision 7/27/09

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Overview of *Service Capture (MAXCAPTURE)*

The SSG Service Capture system, know as MAXCAPTURE, is an application designed to assist service providers with the documentation of services. It is built on the concept that service providers need an easy and streamlined method to document services provided to their students while also ensuring the collection of Medicaid allowable service data for claiming reimbursement purposes. Through our Service Capture system, MACAPTURE offers service providers an efficient way to document special education IEP service delivery and the progress of the student toward goals outlined in their IEP. This system is designed to allow each service provider the ability to build and maintain their own roster of students they serve enter service records for the students, and efficiently submit these claims for potential billing of Medicaid eligible services.

This manual is designed to support the training of service providers as well as provide a reference tool for the functionality and use of the system. The layout of this manual follows the process the user employs to enter data, screen by screen.

Screen Conventions

There are several screen conventions that remain consistent within the system. These conventions include:

- Underlined text is hyperlinked and allows the user to "drill down" into the system detail. When the cursor is placed on these hyperlinks and the left mouse key is depressed, a new detailed (drill down) screen displays.
- Drop down boxes are used to streamline data entry. Fields with drop down boxes have an arrow button next to them.
- The mouse is used to enter fields or to select actions on each screen.
- Users are recommended not to use the "Back" button (on the Internet Explorer Standard Toolbar), which may cause undesired results.
- Error messages are displayed on the top of each screen when they are encountered. Each error message has a hyperlink that links to the field in error.
- The tab key will move you from field to field within a screen.
- The scroll bar on the side of the screen allows you to view data and fields that do not fit on the initial screen window. Scroll down the page to see this data

Flexibility

The Service Capture system is flexible to provide districts with a variety of configurations, allowing users to view or edit specific data elements. As such, this manual cannot address every possible scenario available.   Whenever possible, this manual will alert you to differences that are brought about by district configuration. Be advised that the screenshots in this manual may not match exactly with the screens on your district's configured system.

Browser Options

Currently MAXCapture supports only Internet Explorer and Safari Browsers**. It will not function properly using other browsers like Mozilla Firefox or Netscape etc.**

Home Page

Upon entering the Home Page, you are presented with several options for action and numerous other informational items. From the Home Page, you have the option from the blue menu bar to:

1) Access *Master Data* which leads to **Maintain Provider Roster**: which allows you add and remove students on your roster. Supervisors will have access to **Maintain Supervisor Roster**, to select any providers they supervise.
2) Access to *Data Entry* leading to **Service Capture**: Enter, view and update past/current service records by student. Supervisors will also have access to **Service Approval** which allows them to review and approve the services of providers they supervise.
3) Access to *Reports* which leads to detailed reports of all the services you entered.

How to Change Password

1) On the *Home Page* screen, click on your name in the upper right hand corner of the screen to get to the *Registration* screen
2) On the *Registration* screen, select the change password action by placing the cursor on the words *Change Password* and click the left mouse button.
3) This will take you to the *Change Password* screen where you will enter your current password, the new password, and confirm the new password. Once all three fields are entered, click on the *Save* button.
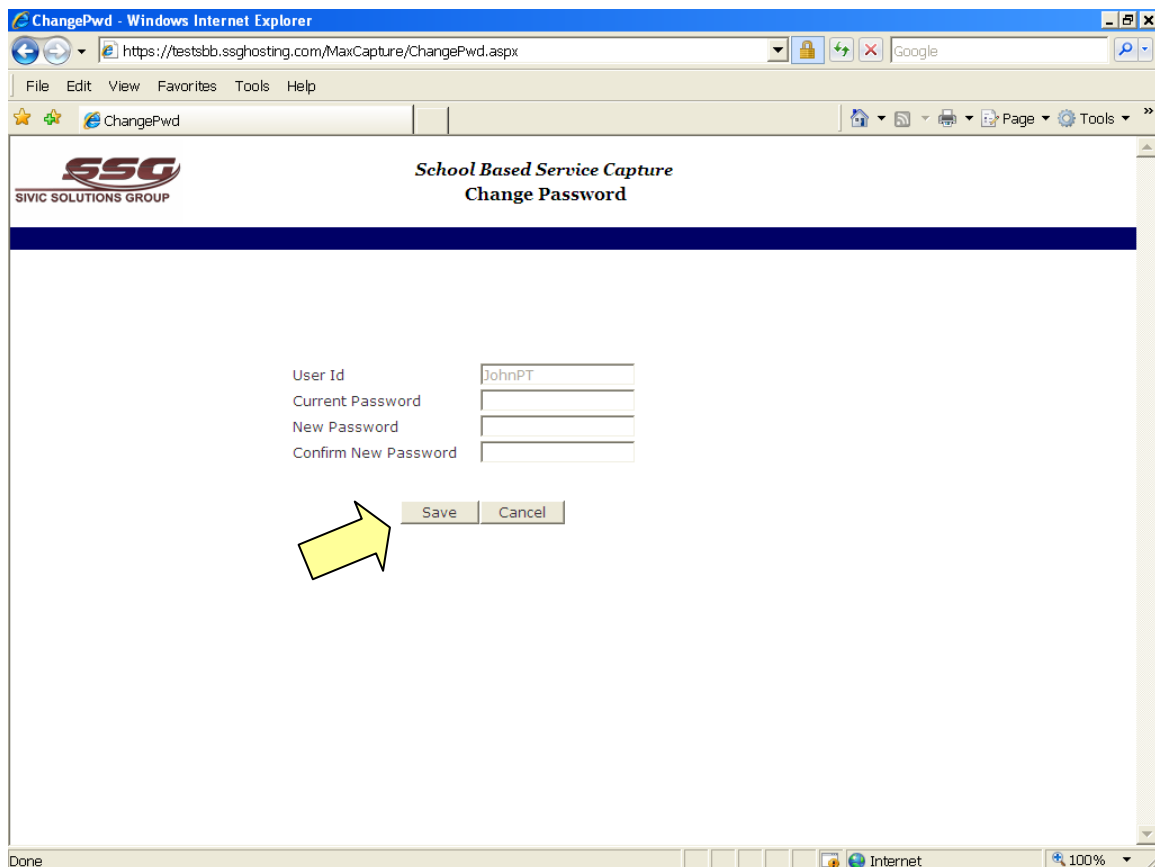
4) Once your password has been changed you are returned to the login screen to log in with your new password. Login using your new password and you will return to the *Home Page*

General Navigation

There are a variety of navigational features in this system that allows you to get around from screen to screen.

Return to your Home Page

Place your cursor over the *Home* key word at the top right of the screen and click the left mouse key. This will return you to your *Home* Page screen shown on page

Logout of the Current System Session

Place your cursor over the *Logout* key word at the top right of the screen and click the left mouse key.

NOTE: The system will automatically time out after several minutes of no data entry. Any unsaved data entered will be lost. If you see a message ("pop-up") indicating you are about to be timed out, click OK to continue the session or click the "save "button to avoid timing out. .The system will take you back to the login screen when the system has timed out.

Please be sure that any pop-up blockers on your computer are disabled for the SSG website. If the pop-up blocker is on, you may be logged out of the website without a warning message!

Maintain Roster - Create Caseload
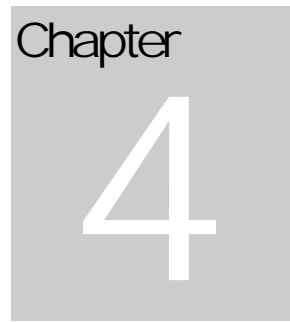
Select the *Master Data – Maintain Provider Roster* by placing the cursor over the words *Master Data*, slide the cursor over *Maintain Provider Roster* and click the left mouse button. From the *Maintain Roster* screen, you can add or remove students from your roster and re-sort the information
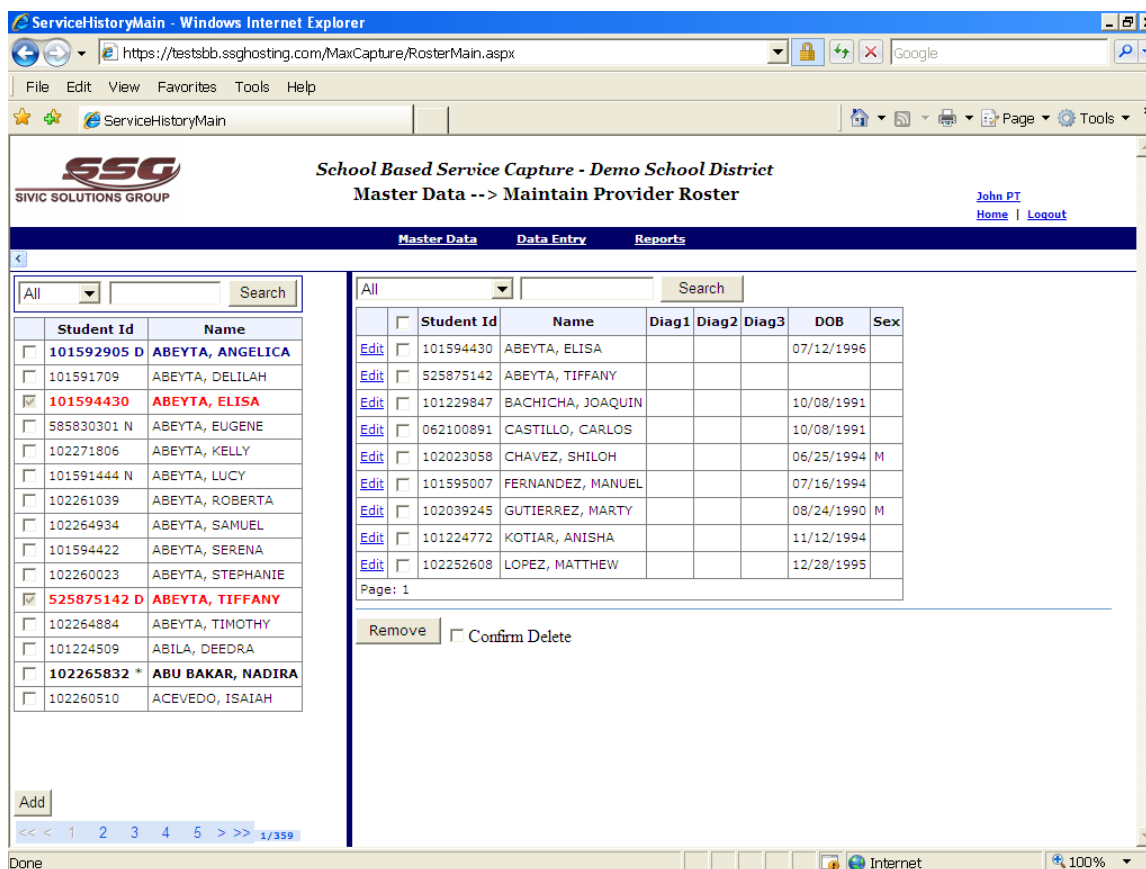
Names of Medicaid enrolled students will be bolded and have an asterisk (*)
Those students currently on the therapist's roster will be highlighted in red on the list of students.

Add a Student to Caseload

All students in the database are listed on the left side of the *Maintain Roster* screen.
1) Find the student in the database by scrolling through the pages or by selecting the search criteria "First Name," "Last Name," "Student No," or "All" data. In the box to the right of the search criteria, type the first name, last name or student number and select "Search."

2) All students meeting the search criteria will appear on the left side of the screen. Scroll down or use the numbers or arrows on the bottom of the box to find the student's name.
3) To add a student to your roster select the student by clicking in the box to the left of the student's name and clicking the add button. The student is added to your roster.

Remove a Student from Caseload

To remove a student from the roster, click in the box to the left box the student ID, then click confirm delete and remove at the bottom of the screen.

Pre–select a Diagnostic code

Once a student has been selected for your caseload, the provider can select a diagnostic code for the student, which will auto populate in data entry, including multiple service data entry. To do this, click on the blue Edit button at the beginning of the student listing on the caseload. When you do this, you will see the field below for that student. Click in the Diag 1 field, and you will see a dropdown menu of diagnostic codes. Select and save the appropriate code for that child. There is no need to select Diag codes 2 or 3

Data Entry - Service Capture

Select Data Entry – Service Capture from the main menu bar by placing the cursor on the words *Data Entry*, sliding the cursor to *Service Capture* and clicking the left mouse button. From the Service Capture screen, you can enter service records for the students on your roster. This is where a service provider actually documents the delivery of a health-related service and the progress of the student toward goals outlined in their IEP. The following screen appears:
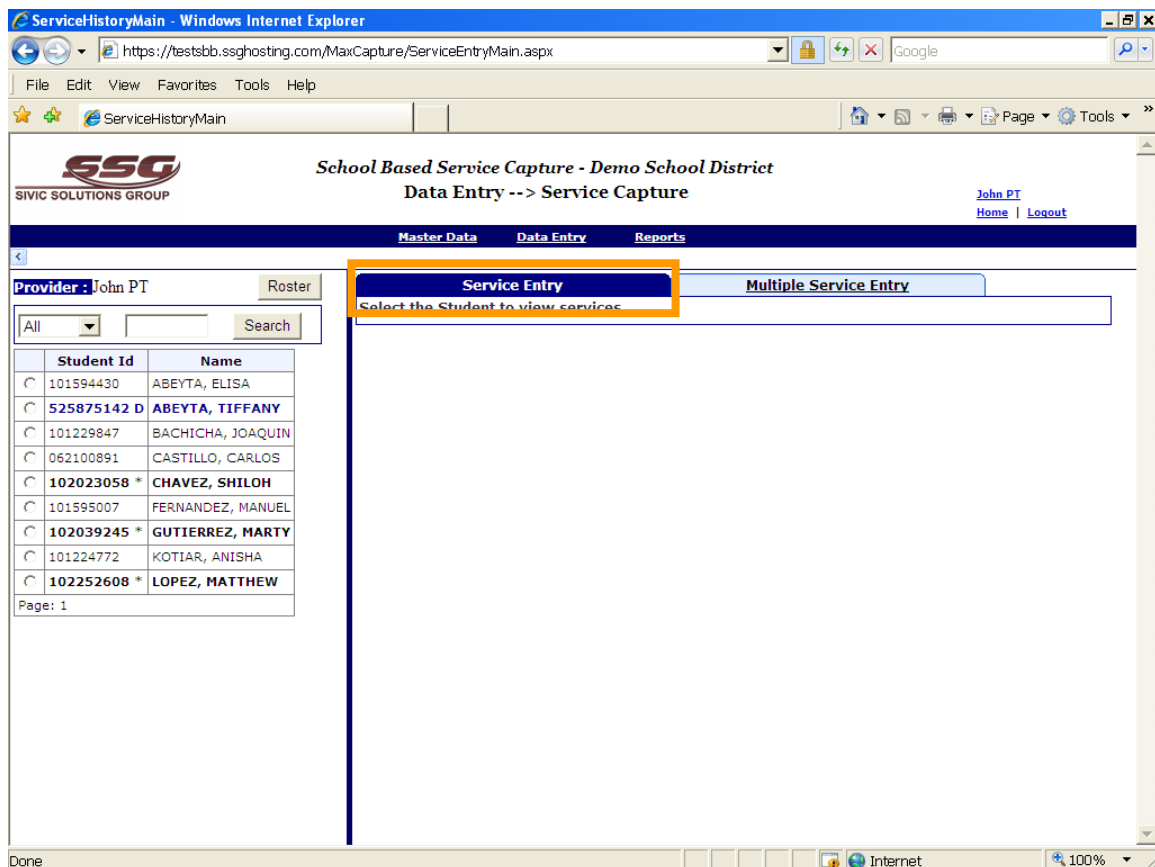
Create New Service Capture

1) Select the student from your roster on the left side of the screen, click in the circle in front of the student's name.

2) Before continuing, check the student's name and date of birth (located under the Service Capture tab) to ensure correct student is selected.

3) If you have recently entered services for this student, a summary view of each service is listed on this page and shows the date of service, the service type, the Medicaid service code, the diagnostic code and the session start and end time.

4) To add a new service, click on the Add Service button. A list of data entry fields appears below allowing the user to enter the information needed to bill Medicaid (required fields) and to have an IDEA compliant service log (optional fields). For New Mexico, these data fields are:

Date of Service: Enter the date in which the service was provided by entering the month, day, and year. All three fields are fill-in fields, which allow you to select the specific service delivery date. If you click on the square box to the right of service date field, a calendar will appear which will allow you to click on a date. If a provider mistakenly selects a Sunday as the date of service delivery, they will be blocked from entering a service. If they select a Saturday, they will see a warning advising them they are about to enter a service for a Saturday. **REQUIRED**

Service Type: Enter the type of service for which you are eligible to perform services. These are supplied in the dropdown box when you place your cursor in the box. In some configurations of the system, your service type may automatically appear. Please note a service type must be entered before the additional fields can be entered. **REQUIRED**

Service Code: Enter the service code of the service provided. The dropdown box displays only those services that correspond to your service type. If you are providing services in an inclusion setting, the group size should be the number of the students in the group who are on your caseload Service. **REQUIRED**

Therapy Methods: Enter the therapy method and activities (from the dropdown) used with the student during the session. Additional comments may be entered in the Notes section. **OPTIONAL**

Diagnosis Code: Enter a diagnosis code from the dropdown list of codes. **REQUIRED, if a Medicaid claimable service code is selected. Not required if a non-billable service code is selected**

Progress: Enter Progress Towards Goal using the drop down list. **REQUIRED**

Minutes: Enter the number of minutes of service provided. **REQUIRED, if a Medicaid claimable service code is selected. Not required if a non-billable service code is selected**

Doses: This is only used by nurses to indicate the number of medication doses given on a day. REQUIRED, ONLY IF "MEDICIATION" IS SELECTED BY NURSE AS SERVICE CODE

Size: Enter number of students in the group when a group service is provided**. REQUIRED if a group service code is selected.**

Notes: Place the cursor over the Notes button to enter Progress Notes for the student. This field allows up to 2,500 characters. Service notes are **REQUIRED** in the event of a Medicaid audit, and most districts require the provider to enter those notes in the MAXCapture system. However, the system will save any service entry without progress notes.

5) Save your work by clicking on the Save button in the lower right hand side of the screen). If you do not wish to save your work, click on Cancel. If you would like to enter an additional service for the same student you may also select the Add Service button. To change or delete a service you have entered, click on the Edit button at the beginning of the service summary line. The data field is opened and you can make and save any changes, or delete a service (please be sure to click "delete" and "confirm delete". You can only edit or delete services until as service sweep occurs. Please check with your Medicaid Administrator if you would like to know the sweep schedule. If you determine that you made an error on a service that has already been swept. Please notify your Medicaid Administrator.

6) To add a new service that is similar to a previous service, a user may select the copy button and the information from the previous service will populate without a date. The provider must then enter required date and save the encounter.

Note: Medicaid rules require that the amount of service time claimed not exceed the service time designated in the IEP. If a provider or student is absent for a scheduled service, a "make-up" session may be claimed for Medicaid billing. Such a make up session should be documented in the notes box. Services missed due to student absence cannot be claimed if they result in exceeding the service time/frequency in the IEP. If services are provided beyond the time frequency specified in the IEP due to student absence or other factors, you may enter the service code "other" and document these services in the notes box.

7) By selecting Print/View Service, Service Capture allows the service provider to print a summary of the service details provided to the student along with session notes. Please note that a better report both in format and "paper-saving" is available in the reports section.

8) These service records remain in your file until the system is swept (usually once every month). When the system is swept, you will no longer see these service records on your Service Capture screen when you click on the student's name. **However, you will be able to view a full record of all services you entered in the Reports –Therapist Service Details of MAXCAPTURE**

9) Student records may be sorted using Service Date (Svc Date), Service Type (Svc Type) or Service Code (Svc Code). Place the cursor on the title bar (Svc Date, Svc Type or Svc Code) and click on the left mouse. The field will be sorted in ascending or descending order.

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Adding Multiple Service Captures

For those providers serving students in groups rather than individually, clicking on Multiple Service Entry enables the user to enter services for a group of students one time. This function can also be used to enter services for an individual student or group of students for multiple dates. Please note that, if entering services for a group of students with different diagnostic codes, those individual diagnostic codes will be recorded for those students if those codes were pre-selected when the provider created the student roster (see page 8). If diagnostic codes we not pre-entered, the provider can enter a single diagnostic code and then go back to Service Entry and edit for the individual codes for each student.
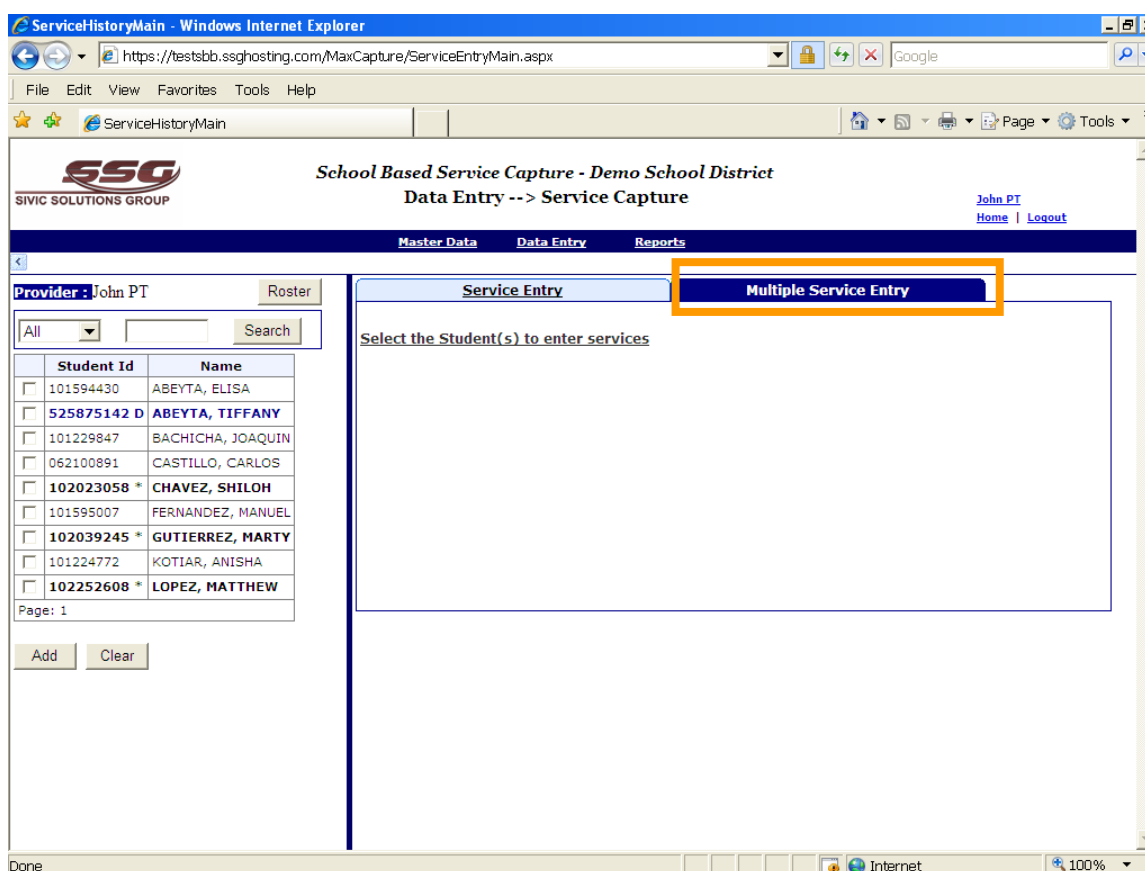
To enter services in the this section , select the student's name(s) from the left side of the screen by checking the box in front of the student's name **and** clicking the *Add* button at the bottom of the student list . Load one or multiple students in the group or the one student for multiple services entry.

In the Multiple Service Entry Screen the service provider must select multiple day of service (e.g. Mon, Wed, Fri) for the multiple students (or a single student) by clicking on the appropriate dates in the calendar **.** When a date has been selected, it will be highlighted in green. As with standard service capture, a provider cannot select a future date. If entering services for a group of students, the provider can have each student assigned their individual diagnostic code if they pre-selected these codes when they created their student roster. To do this, the provider should click in the box "Check to pick Primary diag code from Roster". When the provider enters the service, the diagnostic code field will be unavailable, sine the code was pre-selected. If the provider gets a message that diagnostic codes were not pre-selected, (or they choose not to pre-select these codes) they can proceed to enter the service with a diagnostic code, and the edit for individuals as needed.

After selecting student(s) and date(s) of service, the provider should then click on the add service button. A data entry field will appear. The provider should then enter the service. When entering for multiple dates, there is an assumption in multiple services that all services were provide at the same time of day on each date. If this is not the case, the provider will need to edit the times as appropriate in service entry. Please note that a service should only be entered once in multiple services. For example, on the screen below, three students and six dates are selected. By entering the service once, 18 services will be recorded in the system (3 students x 6 days). Regarding provider notes, the notes section is large enough to hold notes for multiple dates of service. The provider can list the date and the service provider notes for each date in a single text box. However, provider notes may be omitted in multiple service entry and then added as an edit for each service in service entry.

Hiding the Student Roster

If at any time the user need to have more of the service entry screen available for viewing, the student roster can be collapsed

1) The user will collapse the student roster along the left side of the browser screen by clicking on the small blue arrow above the user's roster.

2) The new view will be displayed as below.

3) To view the student roster again, the user will click on the same small blue arrow to unhide the roster**.**

Service Approval

MAXCapture provides the option for a supervisor to approve services for a staff member that is required to be supervised according to Medicaid regulations. The Medicaid Coordinator must indicate staff who are supervisors and   staff to be supervised. The supervisor will then have the capability under "Master Data" to select "Maintain Supervisor Roster" and select the providers they are assigned to supervise. The providers they select to supervise will then appear on their Supervisor roster.

A supervisor will then have the option to select "Service Approval "under "Data Entry" .When that is selected, the following Search criteria will appear. The supervisor can then select the date range, and either the student(s) or provider(s) they wish to see and approve services for.
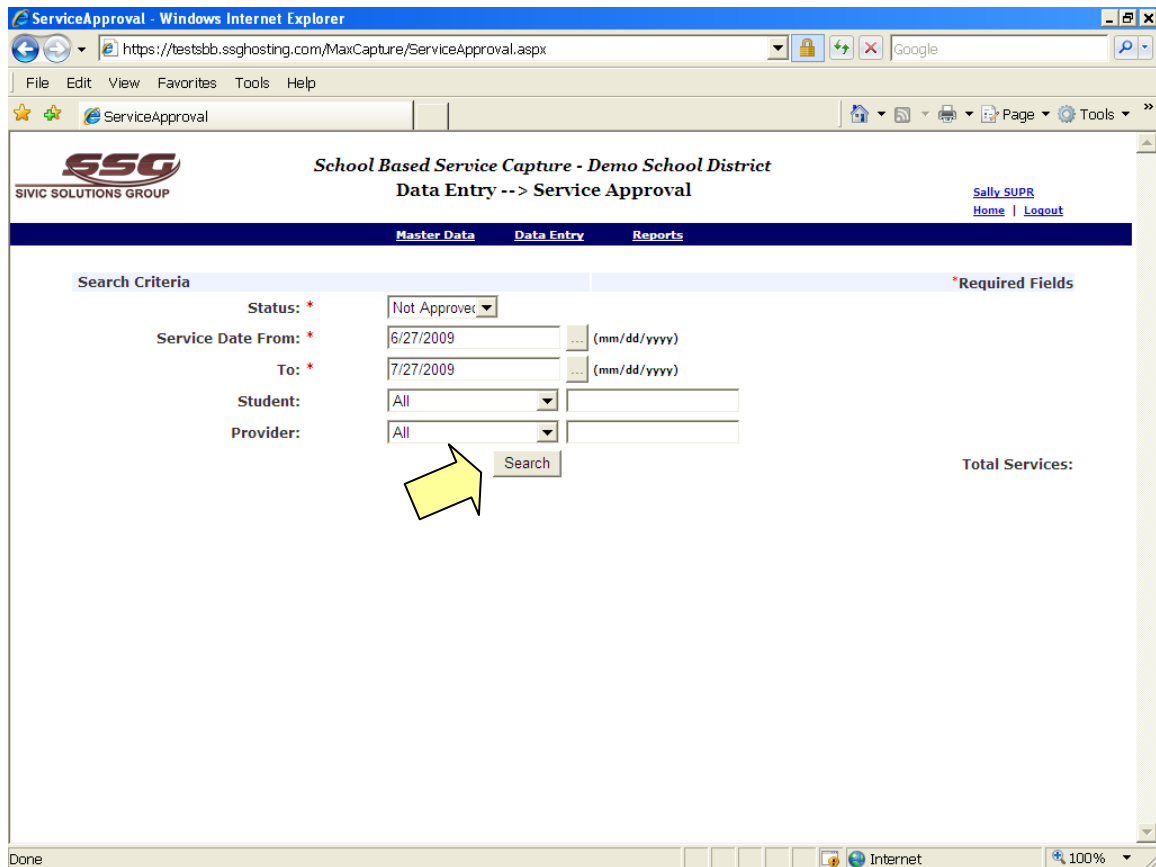
When the supervisor clicks the search button they will have access to review and approve services of the person they supervise (see following graphic).

By clicking on View/Print, at the end of the row they will see the entire service entry, including provider notes. The supervisor can add their own notes (optional) by clicking into the box in the "notes" column. These notes will then be part of the service record. To approve a service, the supervisor clicks in the box in the beginning of the row, and then clicks on the Approve/Save button at the bottom left on the page. By clicking "All Services", a supervisor can select and approve all service on that page**. Please note that only the services on that page will be approved not all service pending approval.**
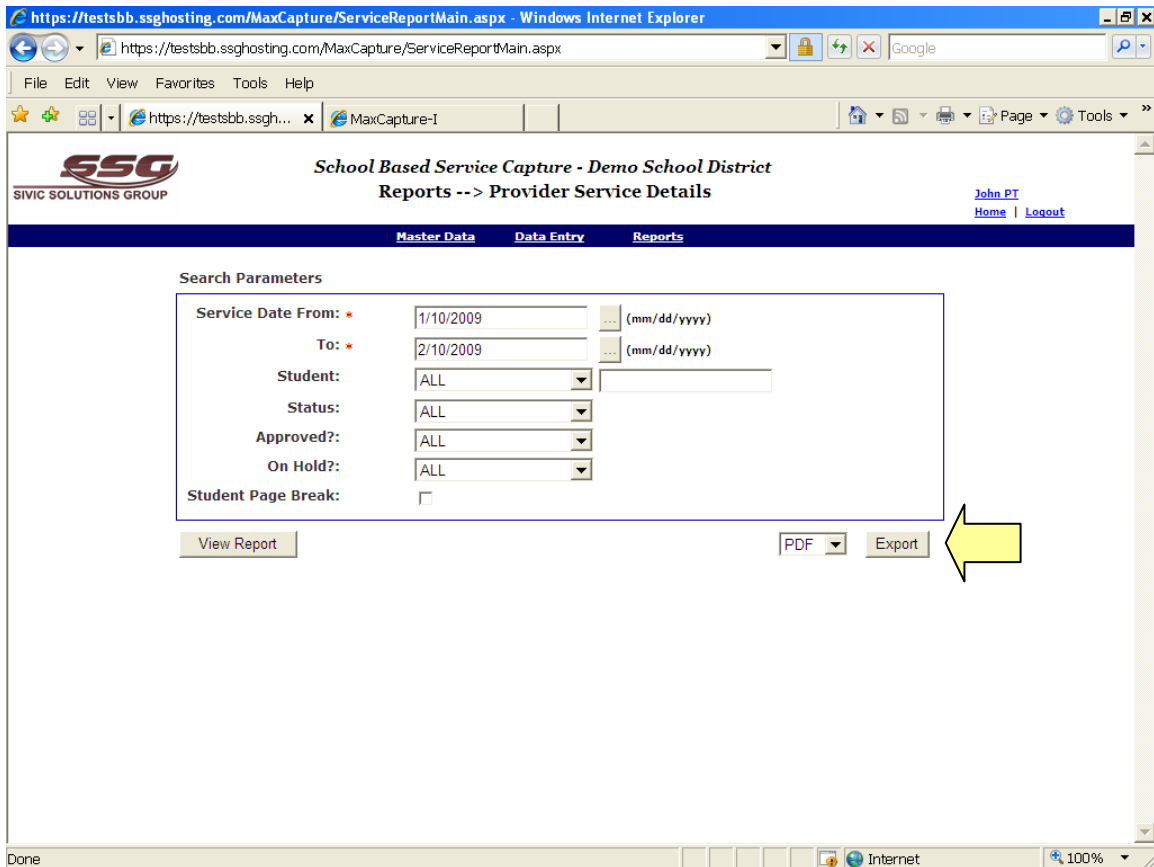
Reports
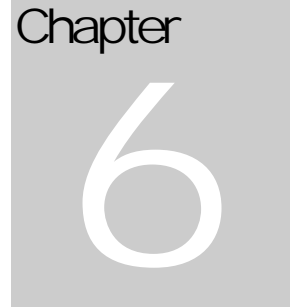
This section describes how to access the reports maintained in the service capture module.

Service Details Report

1) From the main menu bar select *Reports* menu and click on "Provider Service Details" link, the following Report Search parameters screen will be displayed.

2) The provider then selects the dates they wish to see reports for. The default date selection is for the last month. The provider may select any date range they choose, providing it does not exceed one year.

3) The provider then selects an individual student or all students for the date range selected to see a report of services they have entered. Other options are to see service billing status and services placed on hold by the provider.

4) The provider can also see the report with "page breaks" between services for each student by clicking that box.

5) Supervisors will have additional option to choose a provider, multiple providers or all providers in his/her roster to see services entered by the providers.

6) The provider has three options to download a report. Clicking the "View Report" button on the left corner of the page will bring up page by page report. The provider must manually click each next page. This **is not the recommended way to download reports**. On the right corner, there is an "Export" button, with choices for a report in Excel or PDF format. PDF is the recommended format for downloading, and if desired, printing a report. Below is an example of a report downloaded as a PDF file.

Provider Roster Report

1) From the main menu bar select *Reports* menu and click on "Provider Roster" link, the following Report Search parameters screen will be displayed.

2) The provider can use the drop down list to select "First Name," "Last Name," "Student No," or "All" and in the box to the right of drop down list, type the first name, last name or student number. All students meeting the search criteria will be displayed in the report.

3) Supervisors will have additional option to choose a provider, multiple providers or all providers in his/her roster to see students in providers' roster.

4) The provider has three options to download a report. Clicking the "View Report" button on the left corner of the page will bring up page by page report. The provider must manually click each next page. This **is not the recommended way to download reports**. On the right

corner, there is an "Export" button, with choices for a report in Excel or PDF format. Below is an example of a report downloaded as a PDF file.

Provider Service Summary Report

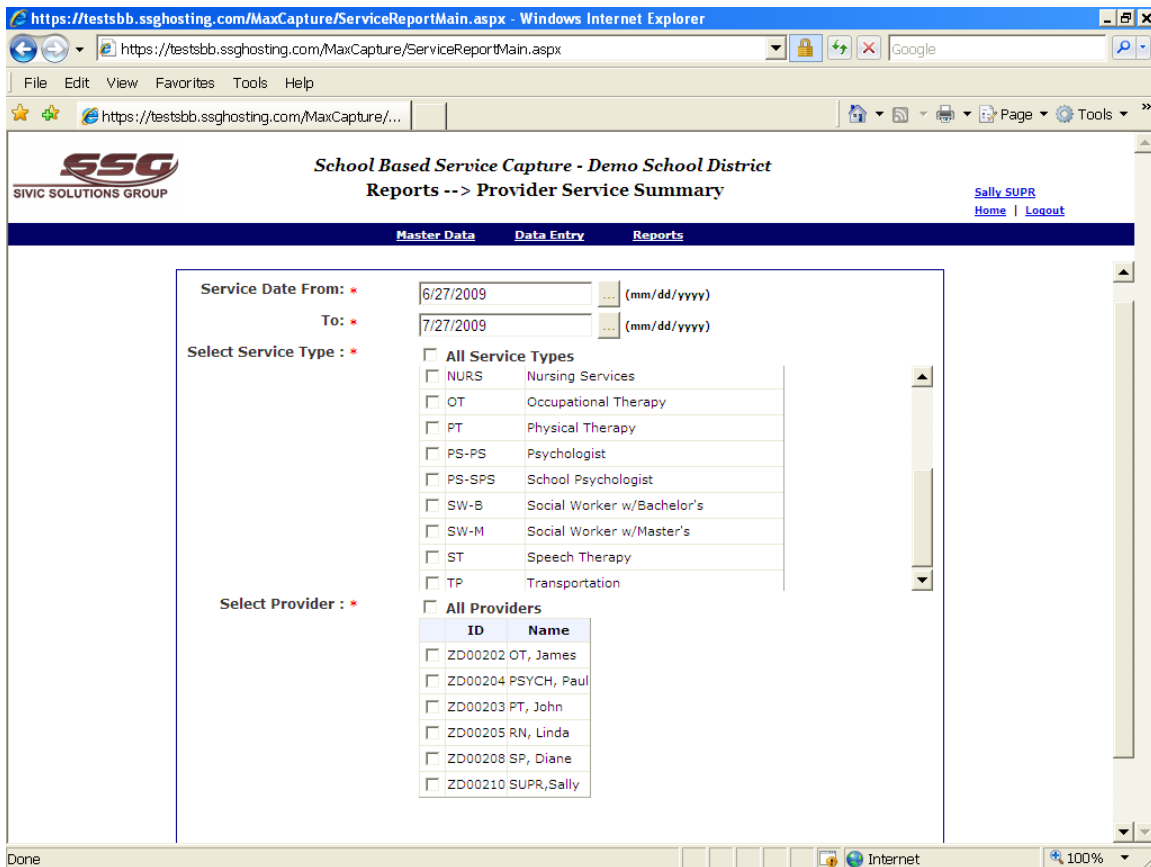1) This report is available only for Supervisors.

2) From the main menu bar select *Reports* menu and click on "Provider Service Summary" link, the following Report Search parameters screen will be displayed.

3) The Supervisor then selects the dates they wish to see reports for. The default date selection is for the last month. The provider may select any date range they choose, providing it does not exceed one year.

4) The Supervisor then selects a service type, multiple service types or all service types.

5) Supervisor can then choose a provider, multiple providers or all providers in his/her roster to see service summary.

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6) The Supervisor has three options to download a report. Clicking the "View Report" button on the left corner of the page will bring up page by page report. The provider must manually click each next page. This **is not the recommended way to download reports**. On the right corner, there is an "Export" button, with choices for a report in Excel or PDF format. PDF is the recommended format for downloading, and if desired, printing a report. Below is an example of a report downloaded as a PDF file.

Student Service Summary Report

1) This report is available only for Supervisors.

2) From the main menu bar select *Reports* menu and click on "Student Service Summary" link, the following Report Search parameters screen will be displayed.
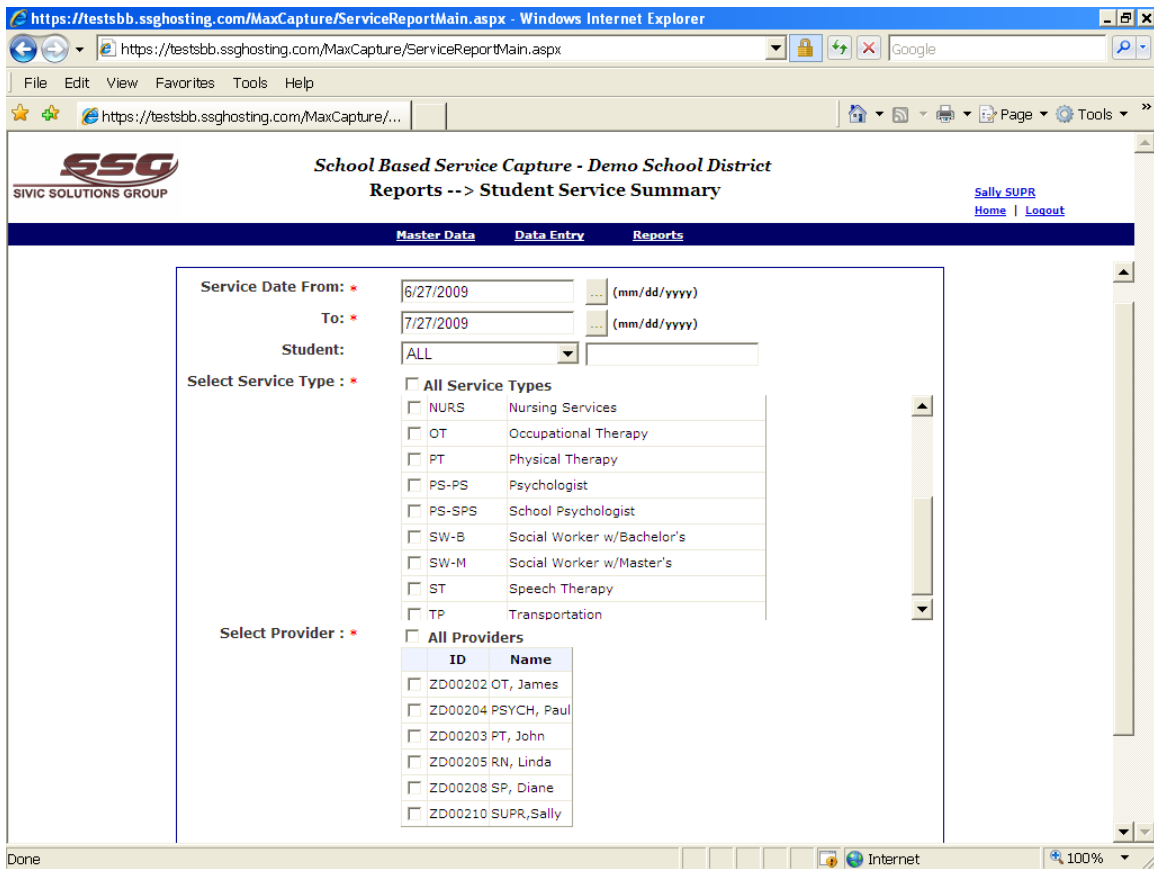
3) The Supervisor then selects the dates they wish to see reports for. The default date selection is for the last month. The provider may select any date range they choose, providing it does not exceed one year.

4) The Supervisor can use the drop down list to select "First Name," "Last Name," "Student No," or "All" and in the box to the right of drop down list, type the first name, last name or student number.

5) The Supervisor then selects a service type, multiple service types or all service types.

6) Supervisors can then choose a provider, multiple providers or all providers in his/her roster to see service summary.

7) The provider has three options to download a report. Clicking the "View Report" button on the left corner of the page will bring up page by page report. The provider must manually click each next page. This **is not the recommended way to download reports**. On the right corner, there is an "Export" button, with choices for a report in Excel or PDF format. PDF is the recommended format for downloading, and if desired, printing a report. Below is an example of a report downloaded as a PDF file.