

# Related Service Staff Approving Service Records for LL Staff & Entering Events

## Help Document

One of two responsibilities for a supervising staff member is to approve the service records for the supervised staff. Records must be reviewed and approved prior to being sent to Medicaid for billing purposes.

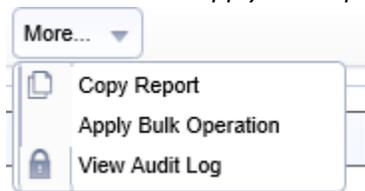
1. On the home page select the report to the right called *Summary Report (Records for Coordinator Approval)*. Once opened, the report will display any completed service records that require approval.

### ▼ Service Capture (CompuClaim - PCG)

#### Summary Report (Records for Coordinator Approval)

**NOTE:** If the supervising staff member and the supervised staff member do not work in the same districts then the supervising staff member will need to select the supervised staff member's school district on the home page before selecting the *Summary Report (Records for Coordinator Approval)* in order to see records to approve.

2. Select *More... > Apply Bulk Operation*



3. Apply Bulk Operation: Select Set Admin Complete



- 3.
4. Review the records listed.
5. There are two options to approve service records:
  - **Apply to Service Records Checked Below...** - select this option if you have individually selected records for approval. Records without a check mark will not be approved.
  - **Apply to All Service Records in Report...** - select this option if you have reviewed all records and they can all be approved.

Select the green bar for either of these options to approve the records.

**Apply to Service Records Checked Below**

**Apply to All Service Records in Report**

Once records are approved, they will no longer display on the report. Move on to second step, page 2.

# Using Events for Supervision & Under the Direction of

It is also the responsibility of a supervising staff member to document the activities that are expected to occur as part of the supervision of or under the direction of requirements set forth by MDHHS and your professional guidelines, health code, and/or administrative rules. This task is best done by creating an Event under the person that is under your direction or supervision. Best practice is to enter an event under the staff member minimally on a monthly basis.

- 1) Go to Search and select Staff
- 2) Enter the name of staff who is under your direction or being supervised – click Search
- 3) Click on the Folder icon next to the staff member’s name
- 4) Click on the Events tab
- 5) Click on Add New Event
- 6) In the Event Description box begin by typing the word “Supervision:” or “Under the Direction of:”
- 7) Add the details of the supervision or under direction of activity that was completed
- 8) Do not forget to note the date and time of the activity
- 9) Click Accept to save

## ***Supervision Example:***

<b>Event Description</b>	Supervision: Met with Marlene to discuss her caseload and concerns regarding David, a 6 year old student. Discussed other strategies for David's success and continued need of services. Date of meeting: 10/12/2015 Time: 8:30 AM Duration: 10 min
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## ***Under Direction of Example:***

<b>Event Description</b>	Under Direction of: Reviewed the medical necessity for student, John Doe. John will continue to need OT services to address problems relating to fine motor skills. Date: 10/12/2015 Time: 3:15 pm Duration: 15 mins
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