Case Managers Approving Service Records for Paraprofessionals & Entering Events

Help Document

One of the responsibilities of the Case Manager is to approve the service records for paraprofessionals. The Case Manager must review and approve service records before they can be sent to Medicaid.

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

4. Review the records listed.

5. There are two options to approve service records:
   - **Apply ‘Set Admin Complete’ 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 ‘Set Admin Complete’ 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.

Once records are approved they will no longer display on the report.
Using Events for Supervision - Under the Direction of

It is also the responsibility of Case Manager to document the activities that are expected to occur as part of the Under the Direction of requirements set forth by MDHHS and cited below.

1.4 UNDER THE DIRECTION OF AND SUPERVISION

Certain specified services may be provided under the direction of another clinician. For the supervising clinician, "under the direction of" means that the clinician is supervising the individual's care which, at a minimum, includes seeing the individual initially, prescribing the type of care to be provided, reviewing the need for continued services throughout treatment, assuring professional responsibility for services provided, and ensuring that all services are medically necessary. "Under the direction of" requires face-to-face contact by the clinician at least at the beginning of treatment and periodically thereafter.

This task is best done by creating an Event under the person that is under your direction or supervision.

   1) Go to Search and select Staff
   2) Enter the name of staff who is under your direction—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 Subject box 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 of the activity
   9) Click Accept to save

Events - Under Direction of/Supervision Example:

<table>
<thead>
<tr>
<th>Event Date</th>
<th>Event Subject</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/09/2016 Tue, 07:34 AM</td>
<td>Supervision</td>
<td>5/5/2016 - Reviewed student IEPs for medical necessity in regards to Personal Care services. Discussed Adam’s increasing need for service with the paraprofessional. Medicaid Sample.</td>
</tr>
</tbody>
</table>

Send a Notification Message To

Accept Cancel