



# **FY25-26 SBAP Session: Direct Service Reports Management**

**DHS & SSG**

**Devon Hogan, Cheriee Moore**


# Housekeeping

- This session is being recorded. By participating in this session, you are consenting to the recording, retention, and use of this session.
- If you have a question or comment, feel free to drop it in the chat and we will respond as soon as we can. Please note, if you ask a question or make a comment verbally during the session, you are consenting to the recording, retention, and use of your statements recorded as part of this session.
- The use of Artificial Intelligence (AI) for notetaking or any other purpose is not permitted during this presentation. AI bots will be removed from attendance.
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- All participants have been placed on mute to alleviate background noise during the presentation.



# Key Topics

- **Importance and Functionality of Reports**
- **Recommendations for Thorough Records**
- **Walkthrough of Specific Reports**
- **Monthly Management Reports**
- **Service Detailed Combined**
  - System Capabilities
  - Recommendation from the Department of Human Services (DHS)
- **Basic Excel Functions**
- **Next Steps**



# Importance and Functionality of Reports

# Why Reports are Important

- **There may be times when you need to review the information housed in Sivic Solutions Group's (SSG) systems. Within MAXCapture, you can find:**
  - Student information
  - Provider information
  - Service documentation
  - Claiming activity
  - Financial Accounting Information (FAI) transactions
- **Monitoring claiming activity is important for receiving (and retaining) reimbursement.**
- **Documentation retention is a requirement for all Medical Assistance (MA) Providers. See Section 5 of the SBAP Handbook.**

## Use Reports to your Advantage

| Type of Report     | Information Available                                      | Source of Information                      |
|--------------------|--|--|
| System Reports     | Student, Provider, and Service information                 | Local Education Agency (LEA)               |
| Exception Reports  | Suspended or Denied services                               | SSG  |
| Management Reports | Paid or Denied claims                                      | MA Program                                 |
| FAI Transactions   | Actual money moving into and out of your LEA's FAI account | Pennsylvania Department of Education (PDE) |



# Recommendations for Thorough Records

## Documentation Requirements

- **As a Medical Assistance (MA) provider, a Local Education Agency (LEA) is responsible for the accuracy of its documentation of health-related MA-covered services that were reimbursed by the Department of Human Services (DHS).**
- **Pennsylvania MA Regulations require medical and fiscal records that fully disclose the nature and content of the services rendered to MA beneficiaries to be retained for at least four years. See 55 Pa. Code § 1101.51(e).**
- **Documentation retention is to support the federal reimbursement LEAs receive through this program.**
- **It is the responsibility of the LEA to maintain documentation, regardless of whether the student leaves the LEA for any reason, including graduation.**



# Documentation Requirements

- **Consider the documentation retention requirements outlined in any oversight agency policies and provider regulations, including the following but not limited to:**
  - Health Insurance Portability and Accountability Act (HIPAA)
  - Family Education Rights and Privacy Act (FERPA)
  - 55 Pa. Code § 1101
- **DHS recommends holding all records (including financial reporting records) for seven years from the date of service.**
- **DHS was reviewed by one of its oversight agencies, which has not yet fully resolved. Please continue to hold records back through FY2014-2015 if you have them, until further notice.**

# Paper Documentation Supporting MAXCapture Data

LEAs will maintain:

- **Service Logs originally documented on paper when entering “on behalf of” the service provider.**
- **Approvals by a coordinator based on documentation they received from a supervisor who doesn’t have access to MAXCapture.**
- **Electronic Verification Statements for all MAXCapture users. Keep these on file in the LEA.**
- **All other data required for compliance for providers (e.g., licensure, proof of education)**
- **All other data required for compliance for students (e.g., signed parental consent, Individualized Education Program (IEP), signed Medical Practitioner Authorization Form (MPAF))**

# MAXCapture Data as Original Documentation

**When Service Logs are entered by the service provider as the original documentation, MAXCapture data must be maintained**

- Download and Maintain the “Service Details – Combined” report
- Must have a signed Electronic Verification Statement on record for all MAXCapture users

**Approvals by the direct supervisor when the supervisor has access to MAXCapture – this can be used to record supervisory signatures when required by the provider’s credentials**

- Personal Care Assistants (PCAs), Therapy Assistants, and PDE-certified Speech Language Pathologists (SLP)



# Walkthrough of Specific Reports

# System Reports

## Direct Service Reporting through MAXCapture

- MAXCapture Online Reports
- Service Exception Reports
- Monthly Management Reports

## Other SSG system reports from e-SivicMACS – be sure to check out the live training calendar

- Random Moment Time Study (RMTS) Reporting
- Quarterly Financials (MAC) Reporting
- Cost Settlement Reporting

# MAXCapture Reports

## Direct Service Reports

- **Exception Report**
  - Student List – IEP
  - Student List – MPAF/Med Auth Services
- **Monthly Management Reports**
- **Service Detail – Combined Report**

# Direct Service Reporting – MAXCapture Online

- **Exception Report**

- Review regularly and address all corrections in timely manner to assure you meet the 180-day timely filing requirement.
- Helpful report to verify CM202 (Med Auth Services) errors
  - Student List – Med Auth Services
- Helpful report to verify CM204 (IEP) errors
  - Student List – IEP

# Direct Service Reporting – MAXCapture Online

## Service Exception Report (Exception Reasons)

|    | A                   | B  | C                     |
|----|---------------------|--|-----------------------|
| 1  | <b>Failure Code</b> | <b>Description</b>   | <b>Service Status</b> |
| 2  | CM013               | Duplicate claim/service  | Denied                |
| 3  | CM201               | Provider is not licensed on the Service date to perform the service                    | Suspended             |
| 4  | CM202               | Medical Authorization is not available for Service date                                | Suspended             |
| 5  | CM204               | IEP is not available for Service date  | Suspended             |
| 6  | PA001               | Transportation service cannot be billed without a corresponding health related Service | Suspended             |
| 7  | PA004               | Parental consent is not available for the Service date                                 | Suspended             |
| 8  |                     |  |                       |
| 9  |                     |  |                       |
| 10 |                     |  |                       |
| 11 |                     |  |                       |
| 12 |                     |  |                       |
| 13 |                     |  |                       |
| 14 |                     |  |                       |
| 15 |                     |  |                       |
| 16 |                     |  |                       |

Navigation: Service Exceptions | Exception Reasons | +

# Direct Service Reporting – MAXCapture Online

- **Scenario: CM202 (MPAF not available) and CM204 (IEP not available):**
  - Demo Student’s service dates between 5/6 – 6/17/2024 were suspended

- Failure Code
- Service Date
- Service Type
- Service Code
- Report Period (prior/current)

| PAH-011-02<br>Pennsylvania School-Based ACCESS Program (SBAP)<br>Service Exceptions for week ending 8/02/2024 |              |          |         |               |           |          |            |            |            |          |                              |                      |       |   |     |         |  |
|---|--------------|----------|---------|---------------|-----------|----------|------------|------------|------------|----------|------------------------------|----------------------|-------|---|-----|---------|--|
| Status  | Failure Code | District | Student | Student Name  | Student   | Provider | Provider   | Service    | Start Time | End Time | Service Type                 | Service Code         | Diag  | I | A   | Report  |  |
| Suspended   | CM202, CM204 | DEMO     | 0101    | DEMO, STUDENT | 4/12/2010 | SSG002   | SSG, KELLY | 05/06/2024 | 08:15 AM   | 08:45 AM | Speech and Language Services | * Individual Service | F840  | S | Yes | Prior   |  |
| Suspended   | CM202, CM204 | DEMO     | 0101    | DEMO, STUDENT | 4/12/2010 | SSG002   | SSG, KELLY | 05/09/2024 | 08:45 AM   | 09:15 AM | Speech and Language Services | * Individual Service | F840  | S | Yes | Prior   |  |
| Suspended   | CM202, CM204 | DEMO     | 0101    | DEMO, STUDENT | 4/12/2010 | SSG002   | SSG, KELLY | 05/13/2024 | 08:45 AM   | 09:15 AM | Speech and Language Services | * Individual Service | F840  | S | Yes | Prior   |  |
| Suspended   | CM202, CM204 | DEMO     | 0101    | DEMO, STUDENT | 4/12/2010 | SSG002   | SSG, KELLY | 05/16/2024 | 08:45 AM   | 09:15 AM | Speech and Language Services | * Individual Service | F840  | S | Yes | Prior   |  |
| Suspended   | CM202, CM204 | DEMO     | 0101    | DEMO, STUDENT | 4/12/2010 | SSG002   | SSG, KELLY | 05/20/2024 | 08:45 AM   | 09:15 AM | Speech and Language Services | * Individual Service | F840  | S | Yes | Prior   |  |
| Suspended   | CM202, CM204 | DEMO     | 0101    | DEMO, STUDENT | 4/12/2010 | SSG002   | SSG, KELLY | 05/23/2024 | 08:45 AM   | 09:15 AM | Speech and Language Services | * Individual Service | F840  | S | Yes | Prior   |  |
| Suspended   | CM202, CM204 | DEMO     | 0101    | DEMO, STUDENT | 4/12/2010 | SSG002   | SSG, KELLY | 05/28/2024 | 08:45 AM   | 09:15 AM | Speech and Language Services | * Individual Service | F840  | S | Yes | Prior   |  |
| Suspended   | CM202, CM204 | DEMO     | 0101    | DEMO, STUDENT | 4/12/2010 | SSG002   | SSG, KELLY | 05/30/2024 | 08:45 AM   | 09:15 AM | Speech and Language Services | * Individual Service | F840  | S | Yes | Prior   |  |
| Suspended   | CM202, CM204 | DEMO     | 0101    | DEMO, STUDENT | 4/12/2010 | SSG002   | SSG, KELLY | 06/03/2024 | 08:45 AM   | 09:15 AM | Speech and Language Services | * Individual Service | F840  | S | Yes | Prior   |  |
| Suspended   | CM202, CM204 | DEMO     | 0101    | DEMO, STUDENT | 4/12/2010 | SSG002   | SSG, KELLY | 06/06/2024 | 08:45 AM   | 09:15 AM | Speech and Language Services | * Individual Service | F840  | S | Yes | Prior   |  |
| Suspended   | CM202, CM204 | DEMO     | 0101    | DEMO, STUDENT | 4/12/2010 | SSG002   | SSG, KELLY | 06/10/2024 | 08:45 AM   | 09:15 AM | Speech and Language Services | * Individual Service | F840  | S | Yes | Prior   |  |
| Suspended   | CM202, CM204 | DEMO     | 0101    | DEMO, STUDENT | 4/12/2010 | SSG002   | SSG, KELLY | 06/13/2024 | 08:45 AM   | 09:15 AM | Speech and Language Services | * Individual Service | F840  | S | Yes | Prior   |  |
| Suspended   | CM202, CM204 | DEMO     | 0101    | DEMO, STUDENT | 4/12/2010 | SSG002   | SSG, KELLY | 06/17/2024 | 11:15 AM   | 11:45 AM | Speech and Language Services | * Individual Service | F8189 | S | Yes | Current |  |

# Direct Service Reporting – MAXCapture Online

**SSG**  
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A SOLIX COMPANY

School Based Service Capture - Demo School District  
Reports --> Student List

Medicaid COORDINATOR  
Home | Logout

Security Admin Master Data Data Entry File Transfer Reports

Student List

Student Data  IEP Data  Med Auth - Services  Med Auth - Eval

Authorization Active Between 05/09/2024 And 08/06/2024  
 Latest Authorization

Student ID: 0101 School: --All--  
Student Last Name: Student First Name:  
Status: Active

Select Service Types\*

| Service Type                 | Description                                  |
|------------------------------|--|
| <input type="checkbox"/> AT  | Assistive Technology Devices                 |
| <input type="checkbox"/> AD  | Audiology Services                           |
| <input type="checkbox"/> EAT | EI-Assistive Technology Devices              |
| <input type="checkbox"/> EAD | EI-Audiology Services                        |
| <input type="checkbox"/> EHI | EI-Hearing Impaired Services                 |
| <input type="checkbox"/> ENP | EI-Nurse Practitioner Services               |
| <input type="checkbox"/> ENU | EI-Nursing Services                          |
| <input type="checkbox"/> EOT | EI-Occupational Therapy Services             |
| <input type="checkbox"/> EOM | EI-Orientation, Mobility and Vision Services |
| <input type="checkbox"/> EPC | EI-Personal Care Services                    |
| <input type="checkbox"/> EPT | EI-Physical Therapy Services                 |
| <input type="checkbox"/> EPH | EI-Physician Services                        |

Reset

## Student List (Med Auth-Services) Report

- To list and review student’s Med Auth data
- Identify when the Med Auth was created and/or updated
- To verify if the services entered are within the Med Auth dates
- Identify if Med Auth dates were created/updated AFTER the sweep cycle

# Direct Service Reporting – MAXCapture Online

- **Scenario: CM202 (MPAF not available) continued**
  - Demo Student’s service dates between 5/6 – 6/17/2024 were suspended
  - Next, run the Student List for Med Auth - Services Data to identify when the MPAF was added or updated in the system. The MPAF was added and updated on 8/9/2024. Therefore, the MPAF was missing at the initial sweep but will be swept at the next sweep cycle

| District | CE | Student ID | Authoriza  | Physician | Physician | Physician | Physician | Physician | Inactivate | Service Ty | Indiv Svc? | Indv Svc St | Indv Svc E | Group Svc | Group Svc  | Group Svc  | Group Svc | Re-Eval? | Override? | Created D  | Updated Date        |
|----------|----|------------|------------|-----------|-----------|-----------|-----------|-----------|------------|------------|------------|-------------|------------|-----------|------------|------------|-----------|----------|-----------|------------|---------------------|
| DEMO     |    | 0101       | 04/09/2024 | CULLENA   |           |           |           |           |            | NU         | Y          | 04/09/2024  | 02/27/2024 | N         |            |            |           | N        |           | 8/8/2024 4 | 8/9/2024 3:47:44 PM |
| DEMO     |    | 0101       | 04/09/2024 | CULLENA   |           |           |           |           |            | OT         | N          |             |            | Y         | 04/09/2024 | 02/27/2024 | N         |          |           | 8/8/2024 4 | 8/9/2024 3:47:44 PM |
| DEMO     |    | 0101       | 04/09/2024 | CULLENA   |           |           |           |           |            | SP         | Y          | 04/09/2024  | 02/27/2024 | N         |            |            |           | N        |           | 8/8/2024 4 | 8/9/2024 3:47:44 PM |
| DEMO     |    | 0101       | 04/09/2024 | CULLENA   |           |           |           |           |            | TR         | Y          | 04/09/2024  | 02/27/2024 | N         |            |            |           | N        |           | 8/8/2024 4 | 8/9/2024 3:47:44 PM |

# Direct Service Reporting – MAXCapture Online

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School Based Service Capture - Demo School District  
Reports --> Student List

Medicaid COORDINATOR  
Home | Logout

Security Admin Master Data Data Entry File Transfer Reports

Student List

Student Data  IEP Data  Med Auth - Services  Med Auth - Eval

IEP Active Between 08/09/2024 And 08/09/2024  
 Latest IEP

Student ID   
Student Last Name   
Status

School   
Student First Name

Select Service Types\*

| Service Type                 | Description                                  |
|------------------------------|--|
| <input type="checkbox"/> AT  | Assistive Technology Devices                 |
| <input type="checkbox"/> AD  | Audiology Services                           |
| <input type="checkbox"/> EAT | EI-Assistive Technology Devices              |
| <input type="checkbox"/> EAD | EI-Audiology Services                        |
| <input type="checkbox"/> EHI | EI-Hearing Impaired Services                 |
| <input type="checkbox"/> ENP | EI-Nurse Practitioner Services               |
| <input type="checkbox"/> ENU | EI-Nursing Services                          |
| <input type="checkbox"/> EOT | EI-Occupational Therapy Services             |
| <input type="checkbox"/> EOM | EI-Orientation, Mobility and Vision Services |
| <input type="checkbox"/> EPC | EI-Personal Care Services                    |
| <input type="checkbox"/> EPT | EI-Physical Therapy Services                 |
| <input type="checkbox"/> EPH | EI-Physician Services                        |

Reset

## Student List (IEP Data) Report

- To list and review student's IEP data
- Identify when the IEP was created and/or updated
- To verify if the services entered are within the IEP dates
- Identify if IEP dates were created/updated AFTER the sweep cycle

# Direct Service Reporting – MAXCapture Online

- **Scenario: CM204 (IEP not available) continued**
  - Demo Student’s service dates between 5/6 – 6/17/2024 were suspended
  - Next, run the Student List for IEP Data to identify when the IEP was added or updated in the system. The IEP was added and updated on 8/9/2024. Therefore, the IEP was missing at the initial sweep but will be swept at the next sweep cycle.

| District | CE | Student ID | IEP Service | IEP Service | Inactivate | Service Ty | Indiv mins | Group min | Frequency | Created Date   | Updated Date        |
|----------|----|------------|-------------|-------------|------------|------------|------------|-----------|-----------|----------------|---------------------|
| DEMO     |    | 0101       | 03/31/202   | 02/27/202   |            | SP         | 60.00      |           | W         | 8/5/2024 14:48 | 8/9/2024 2:51:05 PM |
| DEMO     |    | 0101       | 03/31/202   | 02/27/202   |            | OT         | 30.00      |           | W         | 8/5/2024 14:51 |                     |
| DEMO     |    | 0101       | 03/31/202   | 02/27/202   |            | OM         |            | 60.00     | W         | 8/5/2024 14:51 |                     |
| DEMO     |    | 0101       | 03/31/202   | 02/27/202   |            | TR         |            |           |           | 8/5/2024 14:51 |                     |



# Monthly Management Reports

# Monthly Management Reports Disappear

**Download and Save EVERY MONTH! START NOW!**

**Reports are available for three months before you can no longer access and download.**

**Each report is used in a slightly different way. Having each report at your disposal can ensure that all information is available when you need it.**

## Direct Service Reporting – MAXCapture Online

Every month, review, download and save the 8 Management Reports:

| Report  | Description                             |
|---------|---|
| PAH-101 | Claim Summary by Date Paid              |
| PAH-102 | Claim Summary by Service Date           |
| PAH-103 | Claim Summary by Responsible District   |
| PAH-104 | Claim Analysis by Date Paid             |
| PAH-105 | Claim Summary by Service Procedure Code |
| PAH-106 | Claim Denials RA Date                   |
| PAH-107 | LEA Payments                            |
| PAH-108 | Paid Claims by RA Month                 |

## Direct Service Reporting – MAXCapture Online

Each Report shows different information – download all 8.

| Report  | Description  |
|---------|--|
| PAH-101 | Overview of claims submitted in the payment month  |
| PAH-102 | Overview of claims submitted in the payment month, based on service date   |
| PAH-103 | Data associated by Responsible District, if entered within MAXCapture on the demographic tab of each students' profile |
| PAH-104 | Interim payments by service type with comparison to prior year   |
| PAH-105 | Interim payments by service type including procedure code breakdown with annual display                                |
| PAH-106 | Claims that were denied by Medicaid, tied to the date of submission  |
| PAH-107 | FAI transactions – payments and withdrawals  |
| PAH-108 | Claim-by-claim breakdown of what was paid in the associated PAH-101  |

## Monthly Management Reports - Tips

- **PAH-104 and PAH-105 can be very useful to analyze trends and drill into revenue gaps by service type. Procedure codes in PAH-105 link to the service types listed throughout Section 3 of the SBAP Handbook.**
- **PAH-106 showing claim denials is not cumulative; only one month of information is included at a time.**
  - Note: The “SSG01” denial code in PAH-106 is really showing a rejection that was not successfully submitted to the MA Program. When you see this code, double check your authorizing practitioner’s enrollment information in MAXCapture, and resubmit services with corrections within 180-days of the date of service!

## Monthly Management Reports – Tips (continued)

- PAH-107 shows transaction history for your FAI Account, but does not show a current balance. For information about your FAI Account and how to use those funds, reach out to PDE at [RA-EDSBAPFunding@pa.gov](mailto:RA-EDSBAPFunding@pa.gov).
- PAH-108 is a detailed report of the Net Paid Claims identified in PAH-101 but does not include other adjustments listed in the PAH-101 report.



# Service Details Combined

# What's Great About this Report

## Service Details – Combined

Provides unified list of all services regardless of whether they were manually entered or uploaded into MAXCapture

- 3 months of data with Provider and Student fields blank
- 6 months of data with Provider and/or Student fields completed

## Helpful Uses:

- Regular self-audits
- Excel format for analysis and charting
- Reporting to LEA Administration
- Identifying and monitoring areas of growth for service quality and consistency of care
- Maintaining all service documentation in one place

# Service Details Combined - Report

*School Based Service Capture - Demo School District*  
Home Page


Security Admin Master Data Data Entry File Transfer Reports

- Provider Service Details
- Service Details - Snapshot
- Service Details - Combined**
- Provider Roster
- Supervisor Roster
- Pending Approval Summary
- Auth/Actual Service Summary
- Provider Roster Summary
- Unassigned Student List
- Diagnosis List
- Student List
- Provider List
- Provider License

**Service Details – Combined Report can be found under Reports – Service Details - Combined**

# Direct Service Reporting – MAXCapture Online

## Service Details – Combined Report



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*School Based Service Capture - Demo*  
*School District*

### Reports --> Service Details - Combined

[Medicaid COORDINATOR](#)  
[Home](#) | [Logout](#)

[Security](#)   [Admin](#)   [Master Data](#)   [Data Entry](#)   [File Transfer](#)   [Reports](#)

#### Service Details - Combined

|           |   |     |  |
|-----------|---|-----|--|
| Provider  | <input type="text"/>                    | ... |   |
| Student   | <input type="text"/>                    | ... |  |
| From Date | <input type="text" value="05/10/2024"/> | To  | <input type="text" value="08/09/2024"/>  |

## Why You Need This Data

Keeping records is not just to support direct service claiming reimbursement in a review or audit. Consider:

- Parent requests for proof of service delivery
- Support for employee performance evaluations
- Vendor transitions

You could be saving information for every student, for every service, for every year. The MAXCapture system holds data all the way back through dates of service on and after July 1, 2023. Download that data now and continue to download going forward.

This is YOUR data. Save it how it makes sense for your LEA. If you have a lot of data, smaller files by student or by service type might be more manageable than by fiscal year.

# Direct Service Reporting – MAXCapture Online

- **Service Details – Combined Report Example**
  - Provider and Student Information

| B            | C             | D               | E          | F             | G           | H            |
|--------------|---------------|-----------------|------------|---------------|-------------|--------------|
| Student Name | Provider ID   | Provider Name   | Student ID | Student Name  | Student DOB | Service Date |
| School D     | DEMOPROVIDER2 | DEMO, PROVIDER2 | 0101 *     | STUDENT, DEMO | 04/12/2010  | 05/05/2025   |
| School D     | DEMOPROVIDER2 | DEMO, PROVIDER2 | 0101 *     | STUDENT, DEMO | 04/12/2010  | 05/09/2025   |
| School D     | DEMOPROVIDER2 | DEMO, PROVIDER2 | 0101 *     | STUDENT, DEMO | 04/12/2010  | 05/13/2025   |
| School D     | DEMOPROVIDER2 | DEMO, PROVIDER2 | 0101 *     | STUDENT, DEMO | 04/12/2010  | 05/16/2025   |
| School D     | DEMOPROVIDER2 | DEMO, PROVIDER2 | 0101 *     | STUDENT, DEMO | 04/12/2010  | 05/20/2025   |
| School D     | DEMOPROVIDER2 | DEMO, PROVIDER2 | 0101 *     | STUDENT, DEMO | 04/12/2010  | 05/23/2025   |
| School D     | DEMOPROVIDER2 | DEMO, PROVIDER2 | 0101 *     | STUDENT, DEMO | 04/12/2010  | 05/28/2025   |
| School D     | DEMOPROVIDER2 | DEMO, PROVIDER2 | 0101 *     | STUDENT, DEMO | 04/12/2010  | 05/30/2025   |
| School D     | DEMOPROVIDER2 | DEMO, PROVIDER2 | 0101 *     | STUDENT, DEMO | 04/12/2010  | 06/03/2025   |

# Direct Service Reporting – MAXCapture Online

- **Service Details – Combined Report Example**
  - Service Date with Start & End Times
  - Service Type with Service Code
  - Status of sweep/submission
  - Entered Date (date/time service entered or uploaded in MAXCapture)

|        | H            | J          | K        | L                            | M                    | O                                 | Q              | R                | S            | T                    | U           | V          | W                   |       |
|--------|--------------|------------|----------|------------------------------|----------------------|-----------------------------------|----------------|------------------|--------------|----------------------|-------------|------------|---------------------|-------|
| it DOB | Service Date | Start Time | End Time | Service Type                 | Service Code         | Therapy Method                    | Diagnosis Code | Place of Service | Progress     | Therapy Notes        | Status      | Entered By | Entered Date        | Appro |
| 2010   | 05/05/2025   | 8:15AM     | 8:45AM   | Speech and Language Services | * Individual Service | 03-Articulation; Sound Production | F79            | School (9999 - [ | Inconsistent | Student transitioned | Transmitted | 777        | 8/8/2025 3:01:45 PM |       |
| 2010   | 05/09/2025   | 8:15AM     | 8:45AM   | Speech and Language Services | * Individual Service | 03-Articulation; Sound Production | F79            | School (9999 - [ | Inconsistent | Student transitioned | Transmitted | 777        | 8/8/2025 3:01:45 PM |       |
| 2010   | 05/13/2025   | 8:15AM     | 8:45AM   | Speech and Language Services | * Individual Service | 03-Articulation; Sound Production | F79            | School (9999 - [ | Inconsistent | Student transitioned | Transmitted | 777        | 8/8/2025 3:01:45 PM |       |
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| 2010   | 06/03/2025   | 8:15AM     | 8:45AM   | Speech and Language Services | * Individual Service | 03-Articulation; Sound Production | F79            | School (9999 - [ | Inconsistent | Student transitioned | Unbilled    | 777        | 8/8/2025 3:01:45 PM |       |



# Basic Excel Functions



## Microsoft Excel

Reports from MAXCapture are exported to Microsoft Excel. Tips on how to sort and filter your data can be found on the Microsoft Excel support page here:

<https://support.microsoft.com/en-us/office/basic-tasks-in-excel-dc775dd1-fa52-430f-9c3c-d998d1735fca>

# Microsoft Excel

## To quickly sort your data

1. Select a range of data, such as A1:L5 (multiple rows and columns) or C1:C80 (a single column). The range can include titles that you created to identify columns or rows.
2. Select a single cell in the column on which you want to sort.
3. Click  to perform an ascending sort (A to Z or smallest number to largest).
4. Click  to perform a descending sort (Z to A or largest number to smallest).

## To sort by specific criteria

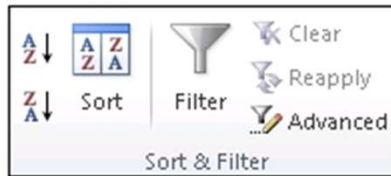
1. Select a single cell anywhere in the range that you want to sort.
2. On the **Data** tab, in the **Sort & Filter** group, choose **Sort**.
3. The **Sort** dialog box appears.
4. In the **Sort by** list, select the first column on which you want to sort.
5. In the **Sort On** list, select either **Values**, **Cell Color**, **Font Color**, or **Cell Icon**.
6. In the **Order** list, select the order that you want to apply to the sort operation — alphabetically or numerically ascending or descending (that is, A to Z or Z to A for text or lower to higher or higher to lower for numbers).

For more information about how to sort data, see [Sort data in a range or table](#) .

# Microsoft Excel

**Filtering data on a table can help you create custom reports by student, by provider, or by any other column of information returned on the report you are working in.**

1. Select the data that you want to filter.
2. On the **Data** tab, in the **Sort & Filter** group, click **Filter**.



3. Click the arrow  in the column header to display a list in which you can make filter choices.
4. To select by values, in the list, clear the **(Select All)** check box. This removes the check marks from all the check boxes. Then, select only the values you want to see, and click **OK** to see the results.

For more information about how to filter data, see [Filter data in a range or table](#).

## Tips for Microsoft Excel Reports Organization

- **Save downloads from the system**
- **Everything has a header**
- **Sort and Filter**
  - By student, by provider, by any header in excel
- **Cut and paste to include all information in one place**
- **Remove duplicates**
- **Encrypt with a password any time you are sending student information by email, especially outside of your organization.**
  - That includes to DHS and to SSG.
  - Send the password in a separate email for greater security.

## Excel Demonstration

- Helpful demonstrations available online, like this one,

**“Sorting in Excel - Basics and Beyond”:**

**[https://www.youtube.com/watch?v=Bm\\_uWOUiUFI](https://www.youtube.com/watch?v=Bm_uWOUiUFI)**

**(00:07:37)**

- **Would you attend an excel training specific to School-Based ACCESS Program (SBAP) reports?**
- **Do you prefer to attend trainings in-person? Or virtually?**



# Next Steps

## Review Your Records

- **What records have you been keeping?**
  - Completed annual electronic signature forms
  - Provider license/ credential
  - Student supporting documentation: IEP, signed Medical Authorizations, Parental Consent
  - Paper documentation to support:
    - Services entered ‘on behalf of’
    - Service approvals for supervisors
    - Monthly Management Reports
    - Service Details Combined Report – (see next slide)
- **Start saving NOW.**

## Establish Good Practices Now

- **Run the Service Details Combined report back through FY23-24**
  - TIP 1: Copy and paste into one table to have all fiscal year information in one place.
  - TIP 2: Consider how much data you will be saving. LEAs with large student populations may need to use smaller timeframes for manageable download times and file sizes.
- **Figure out what is missing and what you need**
  - What exact data points are you looking for and for what dates? Remember to include whether this is for dates of service or dates of payment.
  - Send requests to your regional LEA Liaison.



# Resources

# Helpful Links and Resources

- **DHS SBAP Website:** <https://www.pa.gov/agencies/dhs/resources/for-providers/ma-for-providers/sbap>
- **2024 SBAP Handbook:** <https://www.pa.gov/content/dam/copapwp-pagov/en/dhs/documents/providers/documents/school-based-access-program/2024-sbap-handbook.pdf>
- **SSG SBAP Website:**  
<https://pasbap.ssghosting.com/MAIN/Home.aspx?m=0>
  - By going to “Basic Info” from this page, you can access:
    - Registration links to live trainings in MAXCapture and e-SivicMACS are available within the current fiscal year’s training calendar!
    - A claiming schedule for dates of each system sweep, exception report release, and monthly management report release!
    - Other helpful resources and calendars, such as the program cost report timeframes and certification deadlines!
- **Microsoft Excel Support:** <https://support.microsoft.com/en-us/excel>

# Thank you for participating!

- **Policy questions?**

Send them to DHS at [RA-PWSBAP@pa.gov](mailto:RA-PWSBAP@pa.gov)

- **System questions?**

Send them to SSG at [pasupport@sivicsolutionsgroup.com](mailto:pasupport@sivicsolutionsgroup.com)

- **Regional Liaisons:**

- Jy Rexrode - North and South-Central PA

717-881-5365 [pasbapcentral@sivicsolutionsgroup.com](mailto:pasbapcentral@sivicsolutionsgroup.com)

- Maggie Kiene - Eastern PA

610-737-0213 [pasbapeast@sivicsolutionsgroup.com](mailto:pasbapeast@sivicsolutionsgroup.com)

- Kathleen McDermont- Western PA

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