



Presenters:

Acumatica

Training for Related Service

9/13/2023



How to Log In

Go to: escco.acumatica.com

Select a tenant

- From the drop down box, select ESCCO

Enter credentials

- `firstname.lastname`

Enter default password

- `Happy2023`

Reset password when prompted



Select a tenant

ESCCO

Enter credentials

Username

Password

Sign In

[Forgot your credentials?](#)



Employee Time Card

For Time Card Entry Only users, the Employee Time Card screen will open by default when logged in to Acumatica.

Time and Expenses



Employee
Time Card

Time Tracking

Employee Time Cards

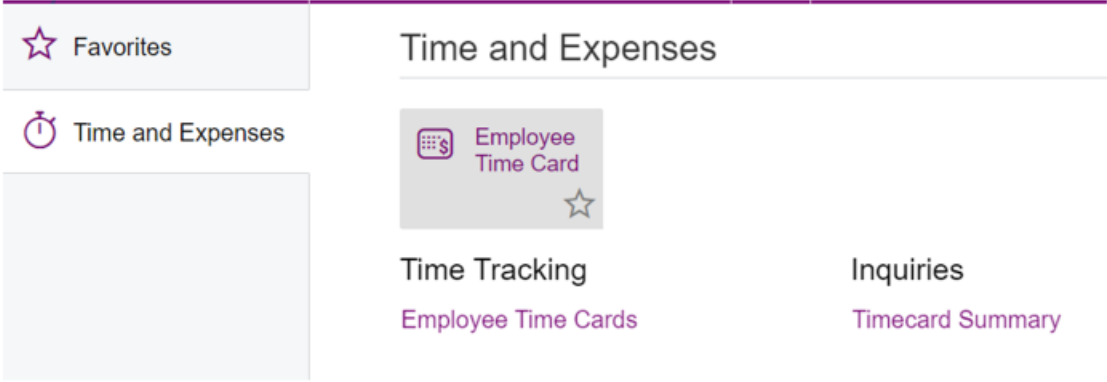
Inquiries

Time by Employee



Employee Time Card

If you do not see the Employee Time Card screen, go to Time and Expenses to open the Employee Time Card screen.





To Create Your First Employee Time Card:

Option A

- Select Employee Time Card from the large rectangle



- *Do not use either option to duplicate a Time Card

Option B

- Under Time Tracking, select Employee Time Cards +NEW

Time Tracking

☆ Employee Time Cards + NEW

- Select the + icon to open a new Time Card

Employee Time Cards



To Create Your First Employee Time Card

← 📄 ↺ + 🗑️ ⏪ < > ⏩ ...

Ref. Nbr.:	<input type="text" value="<NEW>"/>	* Employee:	<input type="text" value="REDACTED"/>
Status:	On Hold	Type:	Normal
Week:	2023-34 (08/20 - 08/26)	Orig. Ref. Nbr.:	

TOTAL _____

00:00
00:00

SUMMARY DETAILS MATERIALS APPROVAL

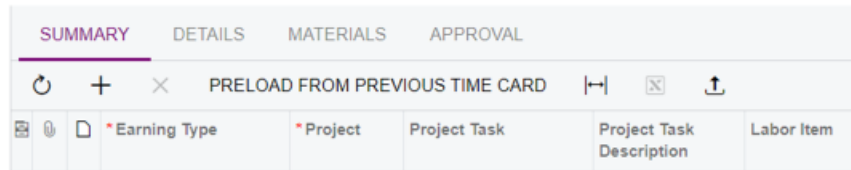
🔄 + × PRELOAD FROM PREVIOUS TIME CARD |↔| 🗑️ ⬆️

📄 🗑️ 🗑️	* Earning Type	* Project	Project Task	Project Task Description	Labor Item
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To Create Your First Employee Time Card

- On the SUMMARY tab, select the + icon to add lines to the time card



SUMMARY					DETAILS	MATERIALS	APPROVAL
↻	+	×	PRELOAD FROM PREVIOUS TIME CARD	←	☒	↑	
📄	🔗	📄	*Earning Type	*Project	Project Task	Project Task Description	Labor Item

For each new line, the following fields must be completed:

- Earning Type defaults to RG
- Project – District Code and Program Type
- Project Task – Student
- Project Task Description defaults to Student selected under Project Task
- Labor Item – The type of activity completed



To Select the Project

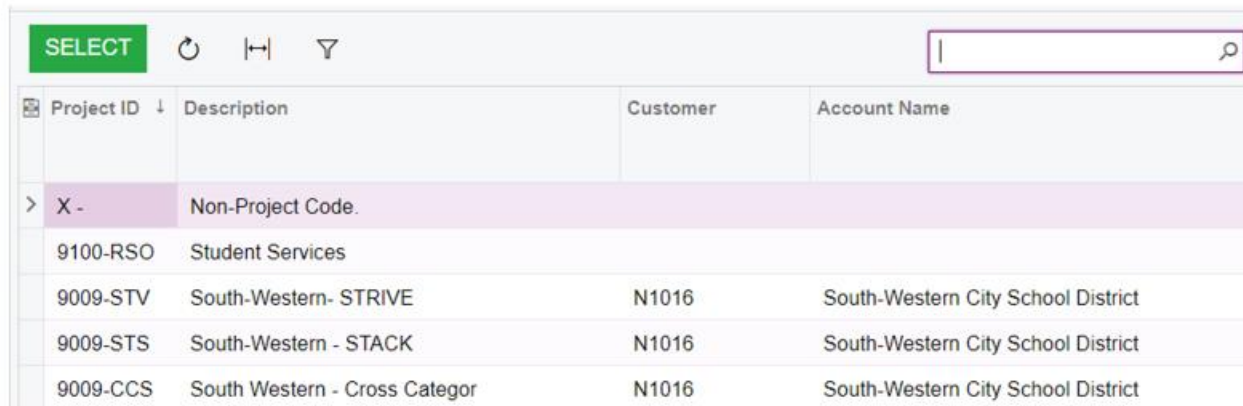
Use the Tab key or place cursor in the blank space under the Project column

SUMMARY						DETAILS	MATERIALS	APPROVAL
PRELOAD FROM PREVIOUS TIME CARD								
*Earning Type	*Project	Project Task	Project Task Description					
* RG								

Use either method to filter:

1. Type in the first few characters of the Project ID and select from the list
2. Use the magnifying glass to open the list of available Projects (see next slide)

To Select the Project Using Magnifying Glass



The screenshot shows a software interface with a search bar at the top right and a 'SELECT' button at the top left. Below the search bar is a table with the following columns: Project ID, Description, Customer, and Account Name. The table contains five rows of data. The first row is expanded, showing a sub-table with three rows of data.

Project ID	Description	Customer	Account Name
> X -	Non-Project Code.		
9100-RSO	Student Services		
9009-STV	South-Western- STRIVE	N1016	South-Western City School District
9009-STC	South-Western - STACK	N1016	South-Western City School District
9009-CCS	South Western - Cross Categor	N1016	South-Western City School District

- Type in a few characters in the lookup field to see the Projects meeting the criteria
- Double click your selection or single click and then SELECT



To Select the Project Task

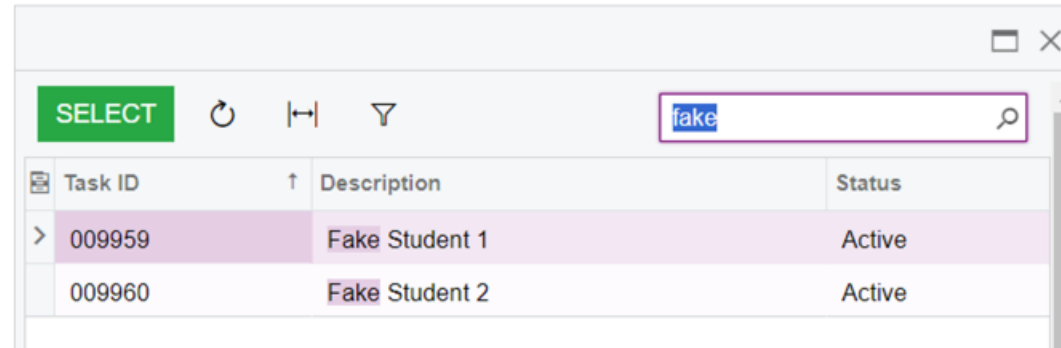
- Use the Tab key or place cursor in the blank space under the Project Task column
- Type in the first few characters in the student name and select student

SUMMARY						DETAILS	MATERIALS	APPROVAL
↺	+	×	PRELOAD FROM PREVIOUS TIME CARD			↔	☒	↑
📄	🔍	🗑️	* Earning Type	* Project	Project Task	Project Task Description		
<	🔍	🗑️	RG	9009-STS	009959	Fake Student 1		

- The Project Task will revert to billing code and the Project Task Description will default to the student name

To View All Project Tasks Assigned to Caseload

- Use the Tab key or place cursor in the blank space under the Project Task column
- Use the magnifying glass to open the list of available students on caseload
- Scroll through the list of student names



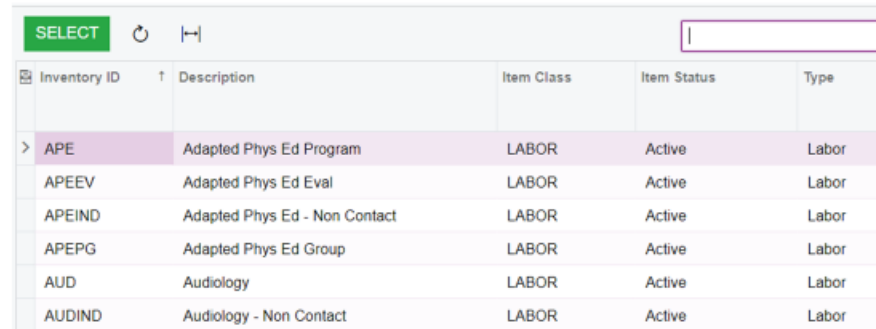
The screenshot shows a software interface with a table of project tasks. At the top, there is a green 'SELECT' button, a refresh icon, a filter icon, and a search bar containing the text 'fake'. Below the search bar is a table with three columns: 'Task ID', 'Description', and 'Status'. The first row is highlighted in light purple and contains the values '009959', 'Fake Student 1', and 'Active'. The second row contains '009960', 'Fake Student 2', and 'Active'. A magnifying glass icon is visible in the bottom right corner of the table area.

Task ID	Description	Status
> 009959	Fake Student 1	Active
009960	Fake Student 2	Active

- Repeat above steps for all Projects assigned to you

Select the Appropriate Labor Item

- The Labor Item defaults to the Employee Labor Code
- To change, use the Tab key or place cursor in the Labor Item column
- Type in a few characters of the Labor Item and select; or
- Use the magnifying glass to open the list of available Labor Items
- Type in a few characters in the lookup field to see the Labor Items meeting the criteria



Inventory ID	Description	Item Class	Item Status	Type
> APE	Adapted Phys Ed Program	LABOR	Active	Labor
APEEV	Adapted Phys Ed Eval	LABOR	Active	Labor
APEIND	Adapted Phys Ed - Non Contact	LABOR	Active	Labor
APEPG	Adapted Phys Ed Group	LABOR	Active	Labor
AUD	Audiology	LABOR	Active	Labor
AUDIND	Audiology - Non Contact	LABOR	Active	Labor

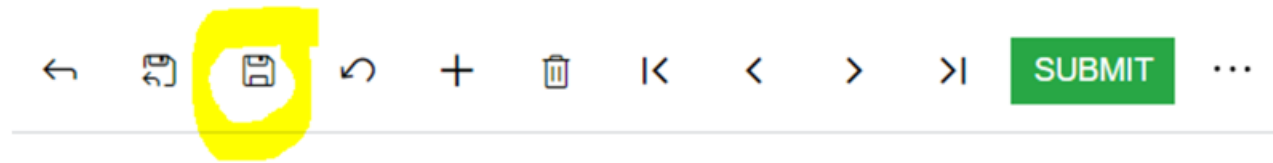
Creating a Master Time Card

- Repeat steps on previous slides until all student names and appropriate labor items have been entered for all students
- A student may have multiple lines on the Master Time Card
- Enter the Labor Items in the same order for each student

PRELOAD FROM PREVIOUS TIME CARD						
		*Earning Type	*Project	Project Task	Project Task Description	Labor Item
		RG	9009-ST5	009959	Fake Student 1	APEG
		RG	9009-ST5	009959	Fake Student 1	APEIND
		RG	9009-ST5	009960	Fake Student 2	APEG
		RG	9009-ST5	009960	Fake Student 2	APEIND

Saving a Master Time Card

At the top left of the Employee Time Card, you will see the following icons:



- Select the floppy disc icon to save changes
- Save changes frequently as you are entering data on the Master Time Card
- Always save changes before logging out or changing screens



Enter Time By Day of Week

- Use the Tab key or place cursor in the blank space under day of week column where time needs to be entered
- Format is HH:MM – the colon is set as default
- Time entered is the actual amount of time in 5-minute increments, e.g., 00:30 to represent a thirty minute session
- You must always enter 4 digits when time is less than one hour (HH:MM)
- You must enter at least 2 digits (HH) when time is one hour, e.g., enter 01 for one hour

* Project	Project Task	Project Task Description	Labor Item	Mon	Tue	Wed	Thu	Fri	Time Spent	Billable
9009-ST5	009959	Fake Student 1	APE	00:30					00:30	<input checked="" type="checkbox"/>
9009-ST5	009959	Fake Student 1	APEIND	00:10					00:10	<input checked="" type="checkbox"/>
9009-ST5	009960	Fake Student 2	APE		00:30				00:30	<input checked="" type="checkbox"/>
9009-ST5	009960	Fake Student 2	APEIND		00:05				00:05	<input checked="" type="checkbox"/>
9009-ST5	009959	Fake Student 1	IEPAPE	01:00					01:00	<input checked="" type="checkbox"/>

Employee Time Card

In the Employee Time Card summary screen, you can see all time cards that have been entered, grouped by status in separate tabs.

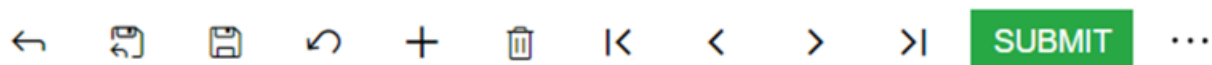
- Current timecards are found under the “On Hold” tab
- Double click on a line to review and/or add to a current timecard

Employee: <input type="text" value=""/>			
ALL RECORDS ON HOLD REJECTED PENDING APPROVAL COMPLETED			
Employee	Employee Name	Week	Status
> 100000310		2023-34 (08/20 - 08/26)	On Hold
100000310		2023-33 (08/13 - 08/19)	On Hold



Review and Submit a Time Card

- When all time has been entered and saved, review the Time Spent for each student
- Make any changes as needed and save the Time Card
- If correct, click the SUMBIT button at the top of the Time Card

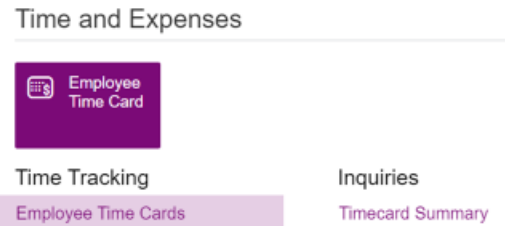


- You will now see your completed Time Card on the Time Card Summary screen under the PENDING APPROVAL tab

PENDING APPROVAL		COMPLETED
Week	Status	
2023-36 (09/03 - 09/09)	Pending Approval	

Correcting a Rejected Time Card

- Go to the Employee Time Card summary screen>Time Tracking>Employee Time Cards

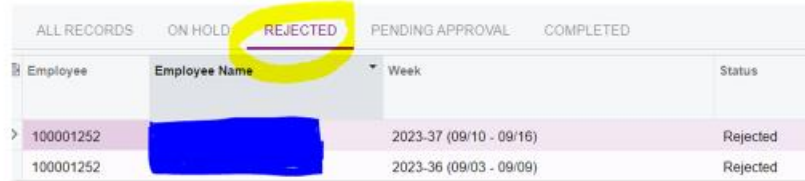


- Select the Rejected button to view all rejected time cards

ALL RECORDS	ON HOLD	REJECTED	PENDING APPROVAL	COMPLETED
Employee	Employee Name	Week	Status	
> 100001252	[REDACTED]	2023-37 (09/10 - 09/16)	Rejected	
100001252	[REDACTED]	2023-36 (09/03 - 09/09)	Rejected	

Correcting a Rejected Time Card

- Double click on a Time Card line to open a Time Card for correction

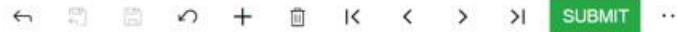


Employee	Employee Name	Week	Status
> 100001252	[REDACTED]	2023-37 (09/10 - 09/16)	Rejected
100001252	[REDACTED]	2023-36 (09/03 - 09/09)	Rejected

- Click the Hold button at the top of the Time Card to enable changes



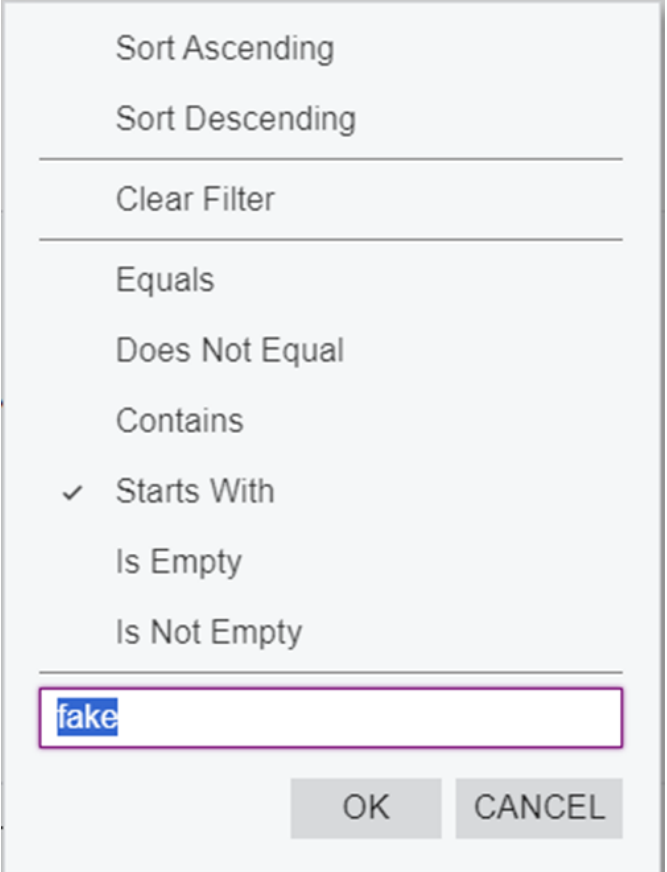
- Once you see the green Submit button, you are able to make needed changes



Correcting a Rejected Time Card

Filter by Project Task Description

- Hover over the Project Task Description button to locate the filter arrow in the top right corner of the button
- Use the Starts With or Contains filter and type in a few characters of the student name
- Select OK



A screenshot of a filter dialog box. The dialog box is light gray with a white background. It contains the following options:

- Sort Ascending
- Sort Descending
- Clear Filter
- Equals
- Does Not Equal
- Contains
- Starts With
- Is Empty
- Is Not Empty

Below the options is a text input field with a purple border containing the text "fake". At the bottom right of the dialog box are two buttons: "OK" and "CANCEL".

Correcting a Rejected Time Card

Filter by Labor Item

- Hover over the Labor Item button to locate the filter arrow in the top right corner of the button
- Use the Contains filter and type in a few characters of the Labor Item
- Select OK



A screenshot of a filter dropdown menu. The menu is light gray with a thin purple border. It contains the following options: "Sort Ascending", "Sort Descending", "Clear Filter", "Equals", "Does Not Equal", "Contains" (which is selected with a checkmark), "Starts With", "Is Empty", and "Is Not Empty". Below the list is a search input field with a magnifying glass icon on the right, containing the text "IND". At the bottom of the menu are three buttons: a help icon (a question mark in a circle), an "OK" button, and a "CANCEL" button.

Correcting a Rejected Time Card

- Double click on the line that needs changes, update and save

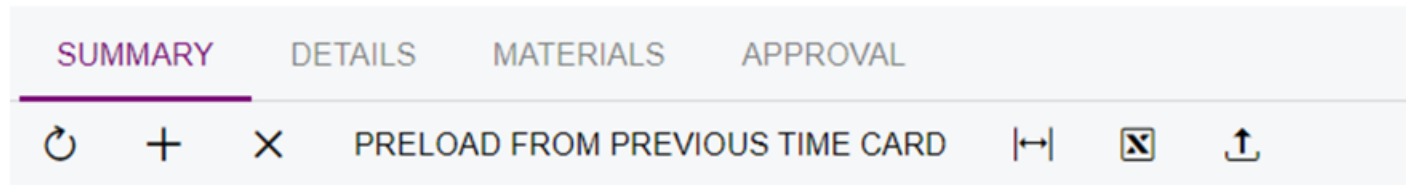
SUMMARY														DETAILS	MATERIALS	APPROVAL									
PRELOAD FROM PREVIOUS TIME CARD																									
		Earning Type	Project	Project Task	Project Task Description	Labor Item	Mon	Tue	Wed	Thu	Fri	Time Spent	Billable												
<		RG	9009-ST5	009959	Fake Student 1	APEIND	01:00					01:00	<input checked="" type="checkbox"/>												
		RG	9009-ST5	009960	Fake Student 2	APEIND		00:05				00:05	<input checked="" type="checkbox"/>												

- Clear filter to return to view all Time Card entries
- Repeat steps to make all needed corrections
- To delete a duplicate line, select the appropriate line and then select the “X” icon under the Summary tab
- Save changes, review, and submit



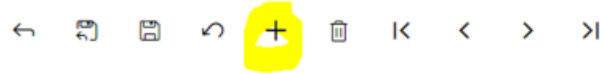
How to Duplicate a Time Card

- You cannot select the week after the first time card has been entered.
- The week will always be the next week from the last time card.
- If an employee does not work for a couple of weeks, blank timecards will need to be created to get to the correct week.
- To copy Projects and Labor Items from the previous time card, click Preload From Previous Time Card



How to Duplicate a Time Card

- On the Employee Time Card summary screen, go to the All Records tab to locate and open the most recent time card
- At the top left of the Employee Time Card, select the + icon to add a new record



- Select Preload from previous time card

SUMMARY							DETAILS	MATERIALS	APPROVAL
↻	+	×	PRELOAD FROM PREVIOUS TIME CARD				←	☒	↑
🔍	🔗	🗑️	*Earning Type	*Project	Project Task	Project Task Description	Labor Item		
	🔗	🗑️	RG	9009-ST5	009959	Fake Student 1	PT		
>	🔗	🗑️	RG	9009-ST5	009959	Fake Student 1	PTIND		



Acumatica Data Entry

- Beginning in 2023, direct and indirect services provided by Related Service staff are billed through Acumatica
- The next slide includes a list of the current direct service labor items for each related service.
- To ensure that districts are billed appropriately, please be certain the correct labor item and amount of time are entered for each service provided



Current Labor Items

Service	Labor Item (Individual)	Labor Item (group services)
Adapted Physical Education	APE	APEG
Audiology	AUD	N/A
Itinerant PD Services	ITPD	N/A
Mental Health Services	MH	MHG
Occupational Therapy	OT	OTG
Orientation & Mobility	OM	N/A
Physical Therapy	PT	N/A
Services for Visually Impaired	VI	N/A
Speech & Language	SLP	SLPG
Teacher of the Deaf	TOD	N/A
Transition Services	TRAN	TRANG



Data Entered in Acumatica by Related Services

- Direct Services and Support for School Personnel/Consultation
- Indirect Services include: communication, lesson planning and prep time, daily data collection, Medicaid data entry and creating materials for students
- Evaluation/Reevaluation
- IEP Meetings and Writing and Documenting IEP Progress



Data Entered in Acumatica by Related Services

- ESC Non-Charge Time
- Contracted Time to a District
- Professional Development Activities
- Staff Absence
- Student Not Available for Services/Student Absent
- School Closed by Calamity Day
- School Closed by District Calendar
- Travel Time



Direct Services & Support for School Personnel/Consultation

Time dedicated to Direct Services and Support for School Personnel/Consultation is entered for each student as reflected on the IEP.

Direct Services and Support for School Personnel/Consultation includes:

- Working with the student directly
- Modifying the school environment (e.g. trying equipment with a student) is attributed to direct service (*only if included on IEP as support for school personnel, assisted technology, modifications or accommodations*)



Direct Services & Support for School Personnel/Consultation

Direct Services and Support for School Personnel/Consultation also include:

- Working with the teacher to identify ways to help the student (*only if included on the IEP as support for school personnel/consultation, assisted technology, modifications or accommodations*)
- Developing training to implement a personal, student specific program such as for exercise or dressing for home or school. These activities are carried out by the student, staff, or family when the therapist or related service staff person is not present and are included if written on the IEP.



Direct Services & Support for School Personnel/Consultation

Direct Services and Support for School Personnel/Consultation also include:

- Parent Training and consultation as specified on the IEP.
- Training staff about emergency evacuation procedures (*only if included on IEP*)
- Assisted Technology when included on the IEP
- ***NOTE: If upon traveling to a school, a related staff person discovers that a student is absent, support for school personnel/consultative services could be provided with that student's teacher, IF consultation is listed on the student's IEP.***



Direct Services: Group

All related service staff who see a group of students with direct IEP service time enter the entire time of the group for each student.

- Maximum group size for Speech & Language services is **4** students
- Maximum group size for APE is **8** students
- The entire time of group session will be entered for each student with IEP services in the group.
- See example given on the next slide for recording group time.



Recording Group Time

Example 1:

If an occupational therapist sees two students with IEP service for a half hour, 0.30 hour (30 minutes) would be entered for each of the two students, using the “OTG” group labor item.

Student	Labor Item	Time
Student A	OTG	0.30
Student B	OTG	0.30



Recording Group Time

Example 2:

If a speech pathologist sees four students in a group for 45 minutes – but only three have IEP service minutes, data would only be entered in Acumatica for the three students with IEP service time. Each would have 0.45 hours (45 minutes) of time.

Student	Labor Item	Time
Student A	SLPG	0.45
Student B	SLPG	0.45
Student C	SLPG	0.45
Student D <u>e.g.</u> peer model	Not Entered in Acumatica	Not Entered in Acumatica



Recording Group Time

EXAMPLE 3:

- If two or more students with IEPs are scheduled for GROUP instruction and only one student is present, use the individual labor item (APE, SLP, etc.) for the student who was present for direct service.

EXAMPLE 4:

- Students without IEPs do not count in determining a group for Acumatica billing purposes.



Indirect Service (Non-Contact Time)

- Indirect Services are coded using the discipline specific **IND** labor item.
- Planning and preparation for student services such as creating lesson plans for instruction and therapy session
- Daily documentation of student performance
- Medicaid Data Entry for Third Party Billing as requested by District
- OTs and PTs use this labor item for time spent developing the Student Intervention Plan/Plan of Care
- Communication with staff to address specific strategies for student success other than time reflected on the IEP as Support for School Personnel/Consultation



Indirect Service (Non-Contact Time)

Time spent creating/making an adaptive support for a specific student when not reflected on the IEP as assistive technology, modifications or accommodations

- Example: Creating a brace or splint to aid a student in holding a pencil
- Example: Creating tactual materials, braille, bubble mapping
- Example: Creating PECs books as a low tech support

*Ongoing need for adapted supports and services should be included on the IEP as assistive technology, modifications or accommodations



Indirect Service (Non-Contact Time)

- Parent-Teacher conferences or other student specific meetings may be included only if a district representative has submitted a written request for your participation
- The IND labor item is a billable service and must be supported/justified by documentation on student data sheets



Evaluation Labor Items – “EV”

Evaluation Type	Labor Item
Adapted PE Eval	APEEV
Mental Health Eval	MHEV
Occupational Therapy Eval	OTEV
Orientation & Mobility Eval	OMEV
Physical Therapy Eval	PTEV
Speech Lang Path Eval	SLPEV
Teacher of the Deaf Eval	TODEV
Transition Eval	TRANEV
Visual Impairment Eval	VIEV



Evaluations & Re-Evaluations

Time spent conducting initial evaluations and re-evaluations should be recorded using the “EV” labor item for each related service discipline

- Include all time spent on direct student assessment and interpretation of results using the “EV” labor item
- Up to one hour to write the evaluation report is recorded using the “EV” labor item; time spent in excess of one hour is recorded using the ESC Non-Charge time labor item
- Time spent participating in an ETR meeting is recorded using the “EV” labor item



IEP Development, Progress Monitoring & Meeting Participation

Use the IEP labor item when:

- Developing/writing the IEP – the time reported for writing the IEP is limited to no more than one hour
- Completing Progress Reports – the time reported for writing the progress report is limited to no more than 15 minutes per student, per grading period (regardless of the number of goals)
- Attending the IEP meeting

*Note: Time spent in excess of one hour for writing the IEP or 15 minutes for writing a progress report is reported using the ESC Non-Charge time labor item



Student Absent/Not Available

Use the discipline specific “NA-G” labor item to report individual or group absences when:

- A student in an ESC classroom/program is absent
- Excused absences for an Itinerant or RSO student
- A student in an ESC classroom/program is unable to be seen due to schoolwide activities, e.g., assemblies, fire drills, state testing

Enter the amount of time you were scheduled to see the student on the day absent or unavailable



Unexcused Absences

The discipline specific “NA” labor item is only used for **Unexcused** absences for Itinerant or RSO students. This is a billable labor item.

- Enter the amount of time you were scheduled to see the student on the day absent or unavailable
- Exception: If there are other Itinerant or RSO students receiving services at the same location, record the absence as NA-G
- The “NA” labor item will never be used for students in an ESC classroom/program



9100-RSO Labor Items

Task	Description
CD	Calamity Day
CPDC	Closed Per District Calendar
CT	Contracted Time
ESC	ESC Non-Charge Time
PRODEV	Professional Development
SA	Staff Absence
TRAVEL	Travel Time



School Closures

- Calamity Day – When school is unexpectedly closed, use the **CD** labor item to record the time of the closure, e.g., 07:30 hours or 02:00 hours
- School Closed per District Calendar – Use **CPDC** when school is closed per district calendar and you are not scheduled to work, e.g., 07:30 hours



Contracted Time to Districts

- Use the **CT** labor item for days when you are contracted to a school district, e.g., enter 07:30 hours for a full school day

*Note: The CT labor item is only used when directed by your immediate supervisor



ESC Non-Charge Time

Use the **ESC** labor item for:

- Time spent completing Acumatica timecards
- Attendance at Related Service meetings and/or orientation
- Evaluation conference with immediate supervisor
- Email communication pertaining to ESC business
- Clerical tasks such as copying and filing paperwork



Professional Development

Professional Development (PRODEV) includes both ESC offered trainings and approved Continuing Education

- Use the **PRODEV** labor item to record time spent on required online ESC training when able to be completed during the regular work day
- Use for attendance at a Continuing Education conference or professional meeting whether in-person or online - Prior approval is required



Staff Absence

Use the **SA** labor item when you are absent

- This may be reported for either a full day (07.30 hours) or whatever part of the day you are absent



Travel Time

- Any time spent traveling is entered using the TRAVEL labor item
- Travel time includes time spent traveling from site to site, not including travel from home to the first site and from the last site home
- Travel time includes arrival/departure procedures at school such as signing in at the office



District Billed Travel Time

- District Billable Travel is only used when assigned
- Each non-member district will have a corresponding Travel time labor item
- This billable time includes actual drive time only