

EasySteps App – Online, Offline & Web-Direct

Three Ways to Access EasySteps:

Video: Online, Offline, WebDirect

<https://youtu.be/v01B5ap4hbM>

You can log into your EasySteps account three ways: 1) EasySteps Web-Direct, 2) EasySteps Online, and 3) EasySteps Offline. Each has its benefits, and it is good to know all three ways to access your account.

1) EasySteps Web-Direct (online from any device)

This version of EasySteps does not require setup. Just go to www.myeasystepsia.com and log in with your user name and password.

With an internet connection, you can access your EasySteps account from any device at any time. While the Easy Steps app is optimized for an iPad or iPhone, you can also access Web-Direct from your desktop or laptop at www.myeasystepsia.com. Web-direct is a great place for data entry but does not have the full capabilities of the iPad or iPhone (i.e. unable to print, and send emails).

2) EasySteps App Online (iPhone and iPad only)

Video: Get the EasySteps Online App (1 minute)

<https://youtu.be/puTrw92uBnl>

1. Go to App store on your iPhone/iPad and "Get" Claris FileMaker Go 19 App.
2. Open the FileMaker Go 19 App (close the getting started instructions; do not register the app).
3. Click on "Hosts" on the bottom of the page.
4. Add (+) a new Host: www.myeasystepsia.com and "save."
5. You should now see the EasySteps App. Enter your account name and password.
6. Congratulations! You are now working on the EasySteps Online app!

The online version of EasySteps requires an internet signal, and there is no need to sync while you are working online.

3) EasySteps App Offline (iPhone and iPad only)

Once you have the Online App, click "Request the Offline App" on your EasySteps HomeScreen and we will create and send your Offline App. Most prefer to do the majority of their work on the offline app. Working offline is faster because it does not require internet AND the offline app does not use your data.

Important Information about the SYNC:

1. **You can only sync ONE device.** Attempting to sync two devices will cause items to be deleted.
2. Syncing requires an internet connection, and only works only on iPad and iPhone. Depending on your internet connection and the amount of data syncing, a sync may last up to 30 minutes.
3. The Offline "Sync" app will only display notes created within the last 2-3 months. Your complete files are available on WebDirect and the Online app.
4. **Syncs need to be successful or with warnings (you can ignore sync warnings).**
5. **If a Sync "Times Out" (or screen falls asleep):** Please optimize your device so your screen does not time out. When your screen falls asleep, the sync does not complete. *If you let your device go to sleep during a sync, it usually completes most of the data updates, but it is NOT a full and complete sync.* Consequently, the next sync has to do a deep (long) scan of the previous sync which causes your sync to take longer. Timed-out syncs create a vicious cycle of longer and longer syncs. Please optimize your device so your screen does not time out.
6. If a sync is interrupted, don't worry. The sync will never "lose" anything. It will finish the next time you sync.
7. **Sync Conflicts:** A sync conflict occurs when changes to the same record have been made online and offline. You do NOT need to report the conflict. EasySteps is automatically notified and will resolve the conflict for you. Often, we can resolve it immediately, but occasionally it may take until the end of the workday. Once we resolve your conflict, your next sync will complete normally.
8. What happens after a sync? Syncing saves all your information in our cloud server and sends your information for billing. You will also receive information from supervisors/assistants AND from EasySteps (billing information, etc.).
9. How often should I sync? The end of your work day (when you have an internet connection) is recommended.
10. Supervisors: A supervisor will not see an assistant's information until the assistant does a sync. The supervisor then needs to sync AFTER the assistant to see the latest changes.
11. Bottom line... everyone should sync regularly!

Customize Your *EasySteps* App

EasySteps attempts to eliminate as much redundancy as possible. All the information you enter into your EasySteps Profile will be used throughout your app, including patient charts, reports, and billing. Be sure to enter as much information as possible in your profile.

Home Screen > Profile

My Account

- Enter all your name with your credentials as you would like it to appear on your notes.
- You can also enter a password that will be used for ALL emails sent to FSCs. If you choose to encrypt emails with a password, be sure to notify the FSC of the password. Otherwise, they will not be able to open the attached notes.
- We also recommend that you enter a "Password Hint" in case you forget your password. Without a hint, we cannot help you recover your password.

Personalization

- Enter your name or company name as you would like it to appear on EasySteps handouts.
- Upload a picture of your logo if you would like the logo to appear on your handouts.
- Add your signature with credentials for EasySteps One-Click Signature!
- If you have cash-pay or private-pay clients, you can enter standard rate and invoice information here.
- Did you know EasySteps is used in several school systems? Choose your school system here to customize your school notes.

Specific Activities

Video: Master List of Specific Activities (20 seconds)

<https://youtu.be/JrtJCzoXB5Y>

- EasySteps preloads a master list of the most commonly used skilled interventions for your discipline! You can use these activities OR customize with your own! This list is your "Master List" that will be available to you in every patient chart.

EasySteps Billing

- Sign up for EasySteps One-Click Billing here!
- Covansys Billing takes approximately one week to obtain approval for EasySteps to manage your Covansys claims.

My Account
App Personalization
My Master Bank of Interventions
Payment Information
My Attendance Policy
One-Click Medicaid Billing
One-Click CFO Billing
Subscription Invoices
Agency Details

- If you are currently billing Medicaid with paper claims, it will take approximately 18 business days to get approved with Medicaid for electronic claim submission.
- If you are currently billing electronically with a clearinghouse other than Trizetto (EasySteps' clearinghouse), it will take approximately 18 business days to get approved with Medicaid for electronic claim submission.
- If you are currently billing electronically with Trizetto, you can be switched to EasySteps billing within one week.
- If you have an account with Trizetto or any other clearinghouse, it is your responsibility to cancel your personal account. We recommend you make sure you aren't locked into a contract before signing up for EasySteps One-Click Billing.
- When you are ready to start the process, enter all information in the billing section. Please make sure you have entered the CORRECT numbers that you have linked to your Medicaid NPI number. We will use the information you provide to set up your electronic billing account (inaccurate information will delay your billing sign-up process).
- EasySteps generates all the needed forms for you to make this process EASY!

Payment Information

- Enter your payment information for your EasySteps Subscription. All major credit cards and bank debit cards are accepted. Update your payment information here if your card expires or you have a new credit/debit card.

Subscription Invoices

- EasySteps subscriptions are charged to the card on file on the 15th of each month. Invoices are posted each month prior to the 15th.

Archiving Charts

Did you know all EarlySteps client records must be maintained for 5 years after the child is no longer provided services in EarlySteps?

With EasySteps, you can archive client charts after they are discharged from your services. You can easily access archived charts when needed (see video below)!

Archive Charts (30 seconds)

https://youtu.be/_DQ13wDo6v4

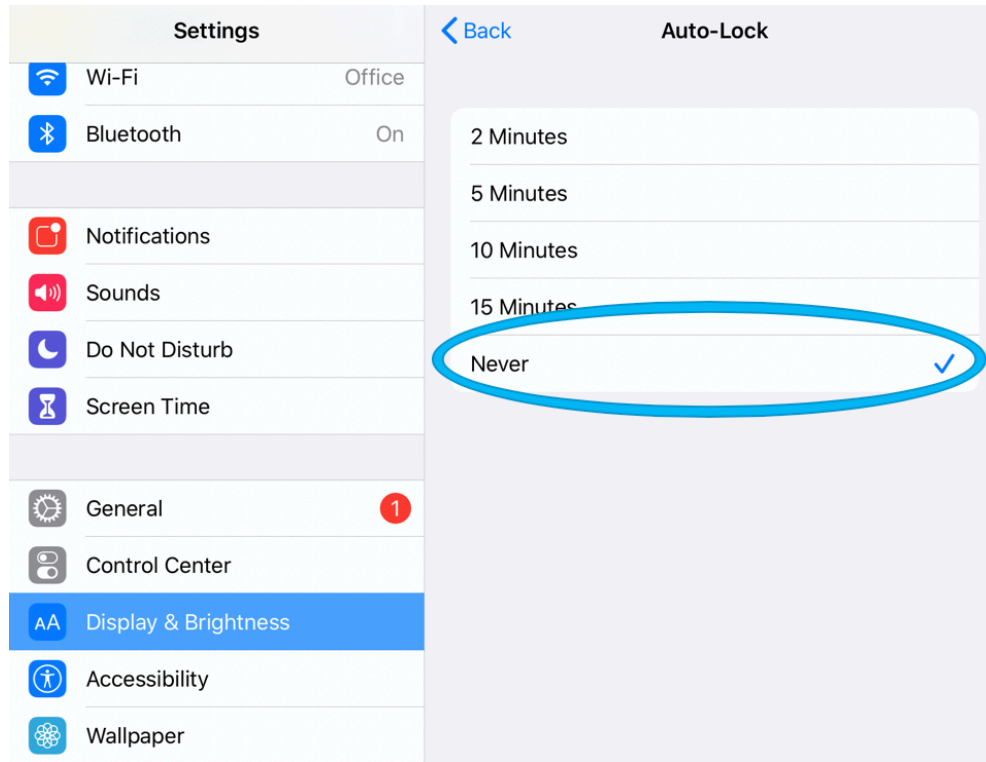
Optimize Your Device

[Print Instructions](#)

iPhone/iPad Display

When syncing your *EasySteps* off-line app, Make sure your device does not "fall asleep." Timing out disrupts your sync. Change your display settings to keep your device screen turned on longer to prevent your device from timing out.

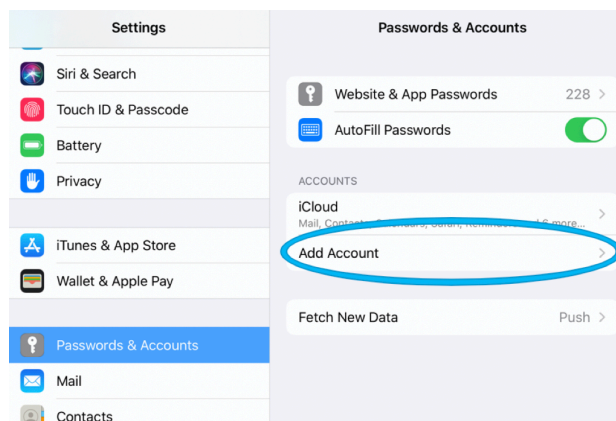
Settings > Display & Brightness > Auto-Lock > 10 Minutes+ or Never



Email Settings

All emails from your *EasySteps* app will send through the email account you set up on your iPad/iPhone. If you do not have an email account, emails will not send. Also, when you are working offline without an internet connection, emails will stay in your outbox and send later when you re-establish internet connection.

Settings > Passwords & Accounts > Add Account > enter your email account info



Enable Dictation

If you don't see the small microphone icon on your keyboard, this will solve your problem.

Settings > General > Keyboards > turn on "Enable Dictation"

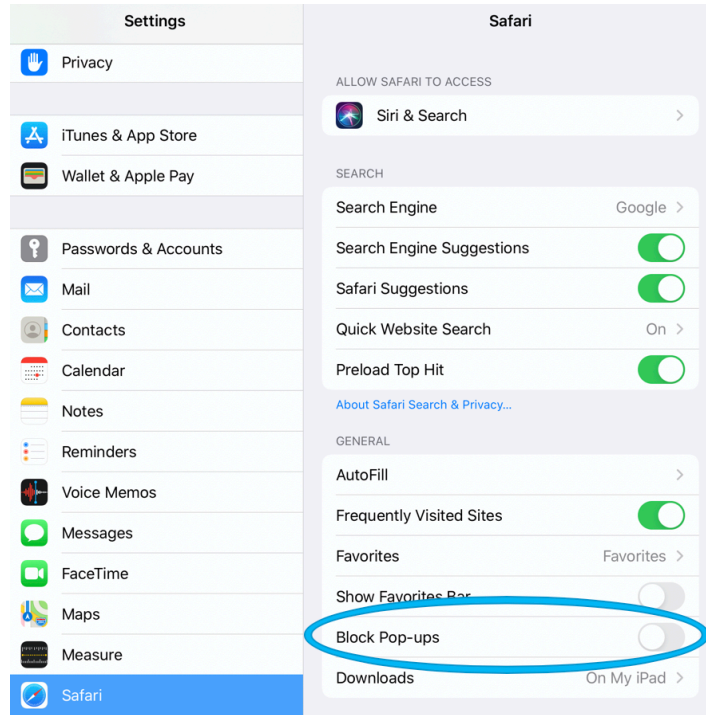
The image shows a screenshot of a document titled "earlySteps Service Provider Contact Note (Mandatory)". The document contains fields for "Child's Name", "DOB", "Provider Name", "Date", "Start Time", "End Time", "Parent/Caregiver participated in the session?", and "Location". Below these fields is an "Outcome Statement(s)" section and a table with columns for "Goals/Objectives", "Specific Activities related to the outcome", "Teaching Strategies", and "Child/Family response/progress related to the activity".

Below the document is a screenshot of an iPhone keyboard. A blue arrow points to the microphone icon located on the bottom left of the keyboard, next to the globe icon.

The image shows a screenshot of the iPhone Settings app. The "Settings" menu is open, and the "General" option is selected. The "Keyboards" settings are displayed, showing various keyboard options. The "Enable Dictation" option is circled in blue, and its toggle switch is turned on.

Allow Pop-Ups

Settings > Safari > Block Pop-Ups > Turn Off



Update your Device Regularly

Keeping your device updated will eliminate many problems with all apps!

Settings > General > Software Update > Install Update & turn on "Automatic Updates"

