Completing a Service Record for Counseling Services

Introduction

This training guide provides instruction for Guidance Counselors, School Psychologists, and Social Workers to complete a past service record for a student with mandated counseling on his/her Individualized Education Program (IEP) in Encounter Attendance.

Overview

Follow the steps below to record a past service provided to a student.

1. Log in to SESIS.

2. On the homepage, click Service Capture, then select Service Calendar from the dropdown menu.

3. Select the student (click to highlight) from your caseload on the left side of the screen for whom you want to record a past service.

4. Click on the Services dropdown menu and select Record Past Services.

Note: The Record Past Services pop-up calendar displays on top of the Service Calendar.
5. Select the date of service to be recorded and click OK.

Note: Since you are recording a past service, future calendar days are grayed out.

6. Verify/enter the actual Start Time and End Time for the session. Modify if necessary.

7. Service Type will be pre-populated. If it is not correct, select the correct service type from the dropdown menu.

Note: A warning message will display if you select a Service Type for a role for which you are not assigned. However, the message will not prevent you from completing the record.
8. Verify the **Language of Service**. Modify if necessary.

9. Verify the **Session Type**. Modify if necessary.

10. Verify/select the **Grouping** value (Individual or Group). Modify if necessary.

   **Note:** When Group is selected, an Actual Group Size dropdown menu will display; enter the actual number of students in the group session.

11. Verify/select the **Service Location** from the dropdown list. Modify if necessary.

12. **Service Description** CPT Codes will display based on the grouping value. You may check more than one service, if applicable, depending on the duration/grouping of the session.

   **Note:** CPT codes for Counseling Services are optional.

13. Select the student’s progress from the **Progress Indicator** dropdown list.

14. Enter your session notes for the student in the **Session Notes** textbox.

   **Note:** The Previous Session Notes field will populate from the most recent saved past service record if the Service Type, Session Type, Grouping, Provider, and Student all match.

   **Note:** Counseling session notes may be entered as “confidential” if judged to be sensitive by the provider.
15. Check **the box** to certify the service. Certifying a Service Record is equivalent to attaching an electronic version of your signature. All services must be certified, including absences and cancellations.

16. Click **Save** to save your entries and finalize the Service Record.

17. After the service capture has been certified and saved, the completed record will display on the Service Calendar in purple. Double click or right-click to view the details.