



Completing a Service Record for Counseling Services

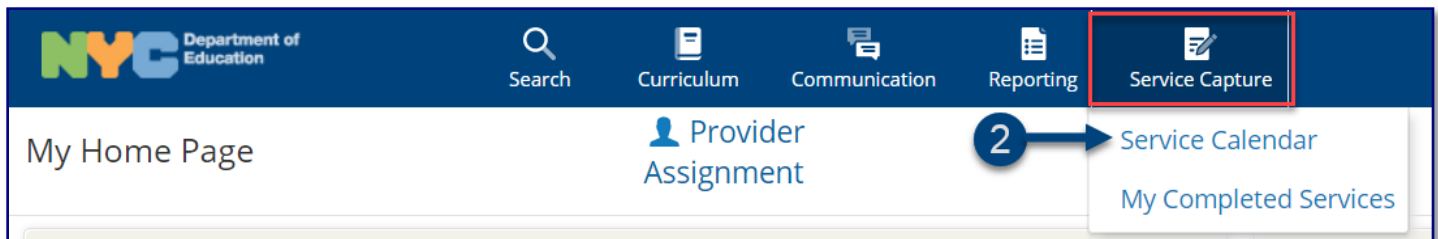
Introduction

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.

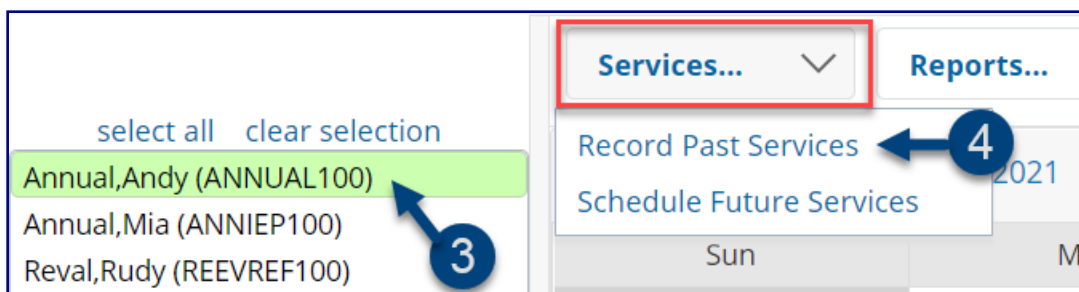
Overview

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**.

Select Date(s) [X]

Record Past Services: 1 profile(s) selected for individual service

April 2021 - May 2021

April							May								
	S	M	T	W	T	F	S		S	M	T	W	T	F	S
14					1	2	3	18							1
15	4	5	6	7	8	9	10	19	2	3	4	5	6	7	8
16	11	12	13	14	15	16	17	20	9	10	11	12	13	14	15
17	18	19	20	21	22	23	24	21	16	17	18	19	20	21	22
18	25	26	27	28	29	30		22	23	24	25	26	27	28	29
19								23	30	31					

(Clear Selected Dates)

5 → OK Cancel

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.

Encounter Attendance

Student: Andy Annual

Student ID: ANNUAL100

Provider: Steve Counselor

Date of Service and Start Time: 05/10/2021 [Calendar Icon] [Clock Icon]

End Time: [Clock Icon]

7 → Service Type: * Counseling Services [Dropdown Arrow]

Language of Service: English [Dropdown Arrow]

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.

Service Type: * Occupational Therapy [Dropdown Arrow]

Selected Service Type does not match your SESIS role.

8. Verify the **Language of Service**. Modify if necessary.

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

8 →	Language of Service:	English	▼
9 →	Session Type:	Service Provided	▼

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.

10 →	Grouping:	Group/Individual?	Group	▼	*Actual Group Size:	(Select)	▼	
11 →	Service Location:	Therapy Room						▼
12 →	Service Description:	<input type="checkbox"/> Group psychotherapy (other than of a multiple-family group) - CPT code 90853 <input type="checkbox"/> Consultation: Phone/Tele-therapy - CPT code 12345						

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.

13 →	Progress Indicator:	(Select)			▼
14 →	Session Notes:	<div style="border: 1px solid red; padding: 5px; display: inline-block;">Previous Session Notes:</div>			

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.

15 Making the certification below, it is my intent to electronically submit this record to the NYC DOE. My submission of this record in this fashion is the legal equivalent of my handwritten signature on the submitted record.

*I certify that I was approved by the NYC DOE to provide the services, that I provided the services as documented in this record, and to the truth of the information it contains.

Save 16

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.

select all clear selection

Annual,Andy (ANNUAL100)
Annual,Mia (ANNIEP100)
Reval,Rudy (REEVREF100)

select all clear selection

Services... Reports... Show Personal Calendar Items Print

today May, 2021

Sun	Mon	Tue	Wed
25	26	27	28
2	3	4	5
9	10 CS 30m: Annual, Andy	11	12
16	17	18	19
23	24	25	26

17