



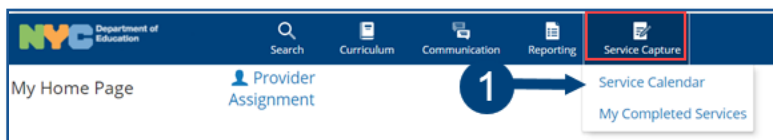
# How to Complete a Service Record for Occupational Therapy Providers

## Introduction

This training guide provides instruction for Occupational Therapy providers to complete a past Encounter Attendance service record for a student.

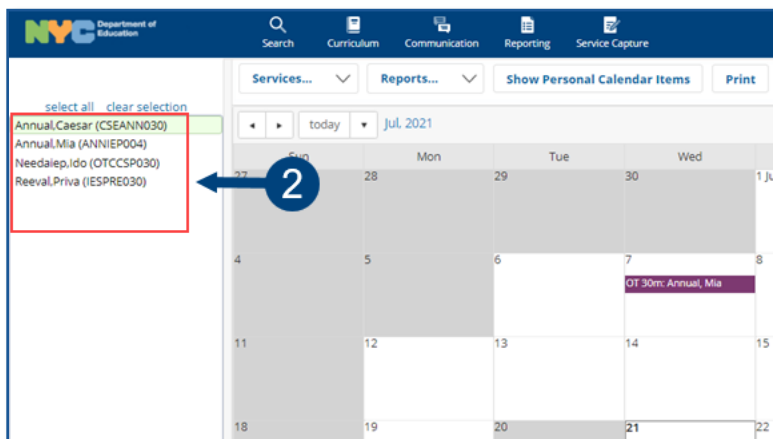
## Recording a Past Service Record for Occupational Therapy Providers

1. From the *Top Navigation Bar*, click *Service Capture* and then select **Service Calendar** from the dropdown list.

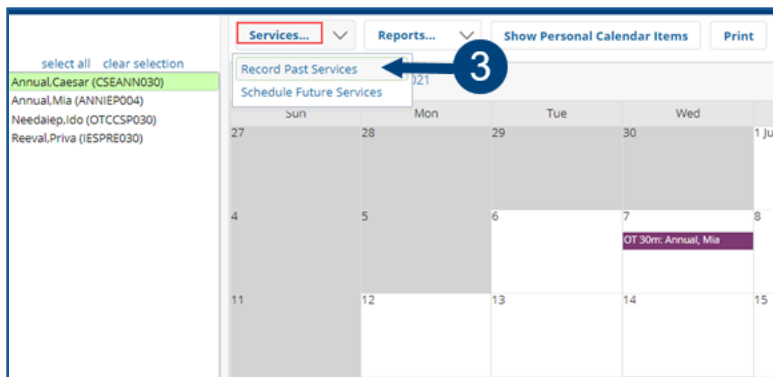


**Note:** You can select the student from your caseload on your homepage.

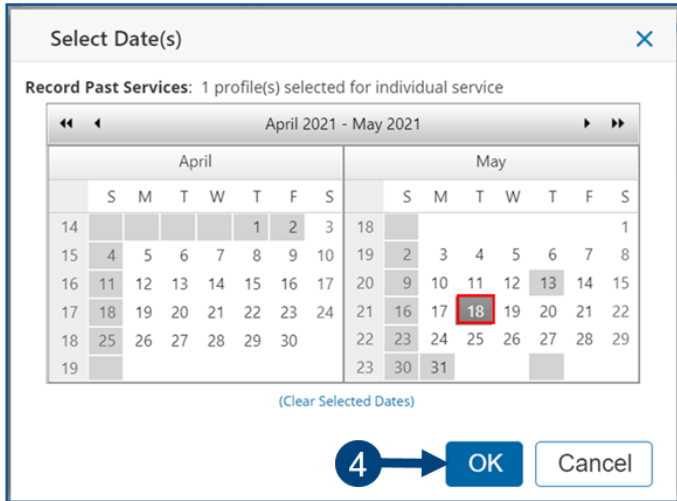
2. Select the **student** from your caseload for whom you want to record a past service.



3. From the *Services* dropdown menu, select **Record Past Services**.



- The *Record Past Services* pop-up calendar opens. Select **date(s)** of service to be recorded and click **OK**.

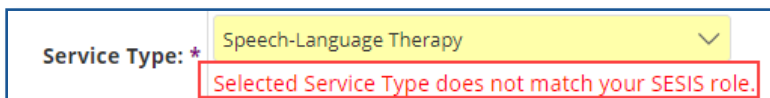


**Note:** When recording a past service, future calendar days are grayed out. In addition, holidays will be grayed out.

- Verify/enter the actual **Start Time** and **End Time** for the session. Modify if necessary.
- Service Type* will be pre-populated. If it is not correct, select the correct **service type** from the dropdown menu.

The screenshot shows the 'Encounter Attendance' form. The fields are: Student: Mia Annual; Student ID: ANNIEP004; Provider: Samantha Otdoe; Date of Service and Start Time: 05/18/2021; End Time: (empty); Service Type: \* Occupational Therapy; Language of Service: English; Session Type: Service Provided; Duration: (empty); Grouping: Group/Individual? (Select). Arrows labeled '5' and '6' point to the Date of Service and Start Time field and the Service Type dropdown menu, respectively.

**Note:** A warning message will display if you select a *Service Type* for a role you are not assigned. However, the message will not prevent you from completing the record.



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

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

<b>Language of Service:</b>	English	7
<b>Session Type:</b>	Service Provided	8
<b>Duration:</b>		
<b>Grouping:</b>	Group/Individual? (Select)	
<b>Service Location:</b>	(Select)	

9. 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.

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

11. *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.

<b>Duration:</b>		
<b>9</b> → <b>Grouping:</b>	Group/Individual? Group	*Actual Group Size: (Select)
<b>Service Location:</b>	(Select)	10
<b>11</b> → <b>Service Description:</b>	<input type="checkbox"/> Group therapeutic procedure - CPT code 97150 <input type="checkbox"/> Occupational therapy re-evaluation - CPT code 97168 <input type="checkbox"/> Consultation: Phone/Tele-therapy - CPT code 12345	

12. Select the **student's progress** from the *Progress Indicator* dropdown list.

13. Enter your **session notes** for the student in the *Session Notes* text box.

**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.

14. 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.

15. Click **Save** to finalize the Service Record.

The screenshot shows a form for creating a service record. It includes a 'Progress Indicator' dropdown menu (callout 12), a 'Session Notes' text area (callout 13), and a 'Previous Session Notes' field showing 'MAY 18 2021: 09:00 AM - 09:30 AM : demo'. Below these fields is a certification statement: 'By clicking 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.' There is an unchecked checkbox for certifying the record. At the bottom left is a 'Save' button (callout 15).

**Note:** After the service record has been certified and saved, the completed service record will display on the *Service Calendar* in purple. Double click, or right click to view the Details.

The screenshot shows a calendar for May 2021. The calendar is displayed in a grid format with days of the week (Sun to Sat) and dates (1 to 31). A purple bar is visible on the calendar, indicating a service record for 'OT 30m: Annual, Mia' on May 18th.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	1 May
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18 OT 30m: Annual, Mia	19	20	21	22
23	24	25	26	27	28	29