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

![Select Date(s) dialog box]

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

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

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

![Encounter Attendance form]

**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.

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.
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.

**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.