



SEGIS FAQs ENCOUNTER ATTENDANCE

Contents

Service Capture Calendar & Reports	1
Scheduling Future Services.....	2
Managing Past Services & Pre-scheduled Services	4
Session Notes	7
Grouping	9
Absences, Cancellations & Make-ups	10
Service Description & CPT Codes	12
Paraprofessionals	13

Service Capture Calendar & Reports

1. Can I edit a Service Record?

A: You are only able to edit service records that are not yet certified.

2. How do I print My Completed Services report?

A: When viewing the *My Completed Services* report, click the **printer icon** located above the report details on the right side of the screen.

3. Why are some service records on my Service Calendar orange instead of purple?

A: The orange service records are saved, but not certified. The purple service records are certified and saved.

4. Which students will I have access to in the SEGIS Service Capture Calendar?

A: You will have access to all students who are listed on the *My Students* caseload on your SEGIS homepage.

5. How do I add or remove a student from my caseload?

A: For caseload management, refer to the training guide titled *How to Add or Remove Students on My Student Caseload* located on the Encounter Attendance page of the [SEGIS Wiki](#).

In some cases, supervisors and designated personnel can provide access to a student. For additional information, refer to the training guide titled *How to Add or Remove Students on a Caseload* located on the Encounter Attendance page of the [SE SIS Wiki](#).

6. If I work in multiple schools, will access to students in different schools also be provided in the Service Capture Calendar?

A: Access to service capture will be provided for all students listed on your caseload.

7. Am I allowed to add my non-mandated students to my caseload?

A: You should only add students to your caseload if a mandate exists for them and you have permission to provide service.

8. If student's in my group session do not change, how can I permanently identify this set of students as my group to expedite input of their service records?

A: On your homepage, scroll to *My Students* (your student caseload). Click **Edit**, and click **+ New Caseload Group**. Input a *Group Name* and then select the students to be included in the group. Click **Accept**.

From your *Service Calendar*, select your new group from the *Filter* dropdown menu at the top left of the screen. Click **select all** to highlight all of the student names, then continue to record the completed session or schedule a future one.

9. Do I need to use the Clock Icon to enter Start Time and End Time on a Service Record?

A: No, if the actual *Start Time* and *End Time* do not match the selectable times on the clock, you should manually enter the correct time.

Scheduling Future Services

1. Will scheduling future services prevent other providers from scheduling services for the same student at the same time?

A: No. Two service providers can schedule future services for the same student at the same time.

2. When I schedule future services for students, are the records certified and saved or only saved?

A: You cannot certify a service record with a *Date of Service* in the future since

you have not yet provided the service. After the pre-scheduled service occurs, you should make necessary modifications to the pre-populated information, and then certify the service record.

3. Can I schedule back-to-back sessions on the calendar?

A: Yes.

4. Can I schedule all of my student sessions for the school year?

A: Yes. You can schedule future services for the entire school year.

5. Can other providers see my scheduled future sessions on the Service Calendar?

A: No. Other service providers with access to the student can only see certified and saved Service Records.

6. Can I delete a scheduled future session?

A: Yes. Hover over the record you want to delete on your *Service Calendar*, and then click on the **X** in the upper right corner of the record. Click **OK** in the pop-up window to confirm. Alternatively, from your *Service Calendar*, double click the service record and then click **Delete** → **Delete Service Record** → **OK**.

7. How do I move a scheduled future session from one day to another?

A: Delete the scheduled session with the incorrect date, and create a new record with the correct date.

8. Can I copy my weekly/monthly schedule to future weeks/months?

A: You can schedule a future service for one student on one day and repeat the session for up to 20 weeks using the *Additional weeks to repeat schedule* dropdown menu on the Encounter Attendance form.

In addition, when scheduling future services for one student on multiple days, multiple students on one day, or multiple students on multiple days sessions can be replicated for up to 20 weeks.

9. Can I see if my student already has a scheduled session with another provider?

A: No. Future sessions of service providers may only be viewed by the provider who scheduled them.

Managing Past Services & Pre-scheduled Services

1. Can I certify more than one pre-scheduled service at one time?

A: No. Each service record needs to be verified and modified as appropriate, and then certified and saved.

2. If the language of service is not English will that language pre-populate?

A: The first time you record services for the student, the language will be English. The language should be modified as needed.

3. Can I add activities not related to encounter attendance on the Service Capture Calendar?

A: No. The calendar is designed for service capture using the pre-formatted *Service Record* form. The calendar is not intended to document non-service related activities.

4. Can I delete a completed service record for one of my students?

A: Yes. Certified past services may be deleted up until the 15th of the month following the service delivery. For example, a service record that was certified for service delivered on March 23 may be deleted up until midnight April 15. Past services that have not been completed (certified and saved) and scheduled future sessions may be deleted at any time. To delete a session, double click on the **Service Record** from your *Service Calendar* and click **Delete**.

5. Can I record multiple sessions for the same student on the same day?

A: Yes. You can record more than one session for the same student on the same day; however, the sessions may not overlap.

6. Am I required to certify past services?

A: Yes. Service records for past services that are saved, but not certified are incomplete and will not appear on the Encounter Attendance reports.

7. Do I certify the session whether I see the student or not?

A: Yes. All past sessions must be completed (certified and saved).

8. Can I print my Encounter Attendance calendar or individual sessions for my own records?

A: Yes. You can print individual sessions. You can also print the *Services Calendar* using the monthly, weekly or daily view. You may need to adjust your

printer settings using *Page Setup* from the *File* menu. In addition, you can print reports of completed services.

9. Is there a way for me to copy and paste one Service Record into another to expedite my input?

A: SESIS pre-populates certain fields when a service record is created.

When completing a service record using *Schedule Future Services*, the pre-scheduled session will populate with the information that was saved when the session was created.

Records created using *Record Past Services* will pre-populate from the most recently recorded past service.

Pre-populated fields can be modified until the record is certified and saved.

10. What information is pre-populated when I create a past service record for a student?

A: Records created using *Record Past Services* will pre-populate from the most recently recorded past service. Pre-populated fields can be modified until the record is certified and saved.

Pre-populated fields include; *Service Start Time* and *End Time*, *Service Type*, *Language of Service*, *Session Type*, *Grouping* and *Service Location*.

11. Can I record multiple Service Records at one time?

A: Yes. You can record multiple individual or group sessions for one student or for a group of students. From the *Services Calendar*, select the student(s) from your caseload listed on the left; then click **Record Past Services**. Click to select the past dates in the pop-up window, and then click **OK**. Verify/enter/select the appropriate information for the student, and then certify and save the record.

Select the next record from the dropdown list. Verify the information is correct, modify as needed. Verify/select the appropriate *Service Description*. Select the *Progress Indicator* and enter your session notes (if applicable). Certify and save the record. Repeat this process for each student for each of the selected dates until all the records have been certified and saved.

12. Do I have to select a Service Type from the dropdown when I complete a past service record for a student?

A: The *Service Type* automatically populates based on your role for the first recorded service for a student. Subsequent records for the student will populate from the most recently recorded past service.

13. How do I indicate a change in the session (e.g. if the student is late)?

A: You must document the session exactly as it occurred including a change in

date, time, service delivered, etc. You may also want to document the reason for the change in the *Session Notes*.

14. What do I enter if the session runs longer than scheduled?

A: You should record the actual *Start Time* and *End Time* for the session.

15. If I provide a specific service to a student three times per day. How do I enter attendance for these students?

A: You must record each session of the day individually.

16. To what goal(s) is the Progress Indicator referring?

A: The *Progress Indicator* refers to the *Measurable Annual Goals* on the student's IEP.

17. Can you clarify Direct vs. Indirect services?

A: The option for an *Indirect* service only pertains to SETSS. If the student's IEP indicates SETSS as direct on the IEP, then *Direct* should be entered in the *Session Type* section of the Encounter Attendance form.

18. Does Encounter Attendance meet Medicaid requirements?

A: Yes.

19. Do I follow Medicaid rules stating that each service provision must have at least 15 minutes allocated to it?

A: You should include all the activities that you performed during that session. If Medicaid reimbursement for that service has a time-based constraint, SESIS will limit the number of activities you can report.

20. Some service descriptions have a number appended to the end. What are these numbers?

A: These numbers are the Current Procedural Terminology (CPT) codes which are required for Medicaid billing. The CPT codes originated from and are maintained by the American Medical Association (AMA). They identify medical, surgical, and diagnostic services and are designed to communicate uniform information about medical services and procedures among service providers.

21. When completing a Speech-Language Therapy Service Record, SESIS displays a workflow prompt that reiterates the need for a Speech-Language Referral document for the calendar year. Where is this located in SESIS?

A: DOE Speech Providers with a Speech Language Pathology license (SLP) should go to the Documents section of the student's online record and click the **Create New Document** dropdown menu. The *Speech-Language Referral* document is listed under the *Related Services* heading. When your input is complete, you must finalize the document by clicking on the **Set Document** link and selecting **Status from Draft to Final**.

DOE Speech teachers with the SLP license must enter their Medicaid ID, National Provider Identification (NPI) and license number into NYCAPS via the employee self-service screen. DOE speech teachers with the SLP are to complete speech referrals within 10 days of first serving a student as per their IEP speech recommendation(s). A new referral must also be completed within ten days of first service following any subsequent change to a student's IEP speech recommendation(s), including newly referred students.

22. How do I access the documents of the student's online record to create a Speech-Language Referral?

A: From the *My Students* caseload on your homepage click the **Documents Icon** for the student.

You can also access the student record by completing a search for the student in the *Quick Access* panel, and click the **Documents Icon** after you have found the correct student.

Session Notes

1. How can I view Previous Session Notes on my service record?

A: The *Previous Session Notes* will display while in edit mode for a service record from the most recent saved past service record if the *Student*, *Provider*, *Service Type*, *Session Type*, and *Grouping* all match.

Note: *Previous Session Notes* will only display if the *Session Type* is *Service Provided*, *Service Provided – makeup*, *Direct Service*, or *Direct Service – makeup*.

2. When I record Session Notes for a group, will it be recorded for all the students in the session?

A: No. You must complete *Session Notes* for each student in the group.

3. Can I edit Previous Session Notes while entering current Session Notes since they display on the same page?

A: No. The *Previous Session Notes* are read only and display for reference purposes only.

4. Is there a way for me to edit my Session Notes after I have certified and saved the record?

A: No; once a service record is *certified/saved* it cannot be edited.

5. Can other providers see my Session Notes?

A: All providers with access to the same student can see the certified *Session Notes* associated with that student on the *Services Completed for Student* report.

6. Are Session Notes specifically required to complete a past service?

A: Yes, with the following exceptions: English as a new Language (ENL) teachers, SETSS teachers, and Paraprofessionals. If you have further questions regarding *Session Notes*, contact your supervisor.

Counseling session notes may be entered as "confidential" if judged to be sensitive by the provider.

7. When will Previous Session Notes display?

A: *Previous Session Notes* display next to the current *Session Notes* when in edit mode on a Service Record. The *Previous Session Notes* will populate from the most recent Service Record if the *Service Type*, *Session Type**, *Grouping*, *Provider* and *Student* all match. The *Previous Session Notes* are read-only, and display for reference. The field will remain empty until a service has been recorded.

**Previous Session Notes* will not display if *Session Type* is *Indirect Service*, *Student Absent*, *Provider Absent* or *Cancelled*.

8. Is there a time limit to input, certify and save Session Notes?

A: Yes. You must complete (certify and save) service records before the end of the 15th day of the month following the session with the student. For example, if a session was held on May 22nd, you must certify the Service Record by June 15th.

9. Medicaid guidelines require that Session Notes be contemporaneous with the service. Does SESIS provide for this?

A: Yes. You should type your session notes and complete (certify and save) the Service Record, as soon as possible after the service was delivered.

10. Does SESIS provide access to the provider's Session Notes after the new school year begins?

A: Yes.

11. How do I record Session Notes for a group session?

A: You must complete *Session Notes* individually in the Service Record for each student in the group.

12. Should Social Workers, Guidance Counselors, and School Psychologists who provide mandated counseling enter Session Notes?

A: Yes. If notes are stored elsewhere due to privacy concerns, Social Workers, Guidance Counselors, and School Psychologists who provide mandated counseling services should indicate in the *Session Notes* where their detailed notes on the session are located (e.g. hardcopy, file, other digital record, etc.).

13. How long will Session Notes be saved in SESIS?

A: Encounter Attendance Service Records, including *Session Notes*, are permanently archived in the student's record in SESIS and maintained indefinitely.

14. How can I see a running attendance log and Session Notes?

A: From the *Services Calendar*, select the student. From the *Reports* dropdown menu, select the *Services Completed for Student* report. Click the **Services Listing** tab to see the detail of certified services provided to the student.

Grouping

1. Do I enter the actual Group Size, or mandated Group Size when recording a past service?

A: You must record the actual number of students in the session. For instructions on recording student absences or session cancellations, please see the next section: *Absences, Cancellations & Make-ups*.

2. Some IEPs do not indicate a Group Size in the mandate. What do I enter in Encounter Attendance?

A: If *Group* was selected on the IEP for the service mandate, it means a group size of eight. When recording a Service Record for a group, indicate the actual size of the group present. When recording a service record for a student that was not in attendance (i.e. *Session Type* is equal to *Student Absent, Provider*

Absent, or Cancelled), enter the *Actual Group Size* as indicated on the student's IEP.

3. How do I record attendance for a group session where only one participant was present?

A: You should indicate the *Grouping* as *Group* and select 1 from the *Actual Group Size* dropdown menu. Document the absent students as directed above.

4. ENL (English as a New Language) groups are allowed up to 12 students per group, but SESIS limits groups to eight. How do I indicate a group size larger than eight?

A: Select *Group* and then 8 from the *Actual Group Size* dropdown menu. Indicate the actual size of the group in the *Session Notes*.

Absences, Cancellations & Make-ups

1. When a provider is absent or cancels a session for the student, is it possible for me to use their time slot?

A: Yes, you can use that time to provide services to the student.

2. Do I have to complete a service record if the student is absent?

A: Yes. This will show that you intended to provide the services as mandated on the student's IEP.

3. If a student is absent, do I select my regular service time, for example 1:00-1:30, and then select "Student Absent" from the dropdown menu?

A: Yes, if the student is absent, record the encounter as you normally would and select *Student Absent* in the *Session Type* field.

4. Is there a way to see how many times a student has been absent or the session was cancelled?

A: There is no separate report for absences/cancelled sessions. However, if you view the *My Completed Services* report, you can filter for one student on your caseload and select the *Services Listing* tab to see all the certified/saved records. The *Service Type* column lists *Student Absent* or *Cancelled*.

5. How can I see if another provider has cancelled their session with a student to allow me to provide service to the same student at the same time of the cancelled session?

A: It is only possible to see other service provider's cancelled sessions on the *Services Completed for Student* report after they are certified. After another

service provider cancels a session, you can certify a service record for the same student during the same time the session was cancelled.

6. How can I cancel the whole day in case the Provider is absent or needs to attend Professional Development?

A: The functionality to cancel a whole day does not exist. Each pre-scheduled session will need to be edited to reflect *Provider Absence* or *Cancelled* in the *Session Type* field.

If no pre-scheduled service records were created, a past service record needs to be created for each student and the *Session Type* should indicate either *Provider Absence* or *Cancelled*.

7. What constitutes a student absence?

A: A student is considered absent from a scheduled session when the student does not attend school that day, or when present at school, refuses to attend the scheduled session.

8. How do I record a student absence?

A: Individual: When completing the Service Record, from the *Session Type* dropdown menu, select **Student Absent**. You should record the planned duration of the session in the *Start Time* and *End Time* fields. You do not have to record *Language of Service*, *Service Location*, *Service Description*, *Progress Indicator* and *Session Notes*; however, it is best practice to document in *Session Notes* why the student was not available, if known. You must complete (certify and save) all absences.

Group: For a student absent from a group session, enter the *Actual Group Size* as indicated on the student's IEP. From the *Session Type* dropdown menu, select **Student Absent**. You should record the planned duration of the session in the *Start Time* and *End Time* fields. You do not have to record *Language of Service*, *Service Location*, *Service Description*, *Progress Indicator*, or *Session Notes*. It is best practice to document in *Session Notes* why the student was not available, if known. You must complete (certify and save) all absences.

9. What constitutes a provider absence and how should I record it?

A: From the Service Record *Session Type*, select **Provider Absent** when a session was scheduled but you were unable to provide the service. Examples of this would be when a provider takes personal leave or sick time. You should enter the session *Start Time* and *End Time* as planned, for example, 9:00 AM to 9:30 AM.

10. How do I record the absence of a provider?

A: Individual: When completing the Service Record, from the *Session Type* dropdown menu, select **Provider Absent**. You should record the planned

duration of the session in the *Start Time* and *End Time* fields. You don't have to record *Language of Service*, *Service Location*, *Service Description*, *Progress Indicator*, or *Session Notes*. It is best practice to document in *Session Notes* the reason for the absence. You must complete (certify and save) all absences.

Group: For a group session, enter the *Actual Group Size* as indicated on the student's IEP and the time you planned to conduct the session in the *Start Time* and *End Time* fields. From the *Session Type* dropdown menu, select **Provider Absent**. You do not have to record *Service Location*, *Service Description*, *Progress Indicator*, or *Session Notes*. It is best practice to document in *Session Notes* the reason for the absence. You must complete (certify and save) all absences.

11. What constitutes a cancelled session?

A: Select **Cancelled** when the reason is anything other than *Student Absent* or *Provider Absent* (as described above). This includes:

- *Unscheduled school closings* (e.g. snow days, half-days)
- *Student is in school but is unavailable due to participation in other school activities* (e.g. school trip, assemblies, testing)
- *Provider is performing another DOE-related task* (e.g. IEP or other meetings, DOE-approved training or professional development)

You do not need to record cancellations for days that are shown in gray on the *Service Calendar*.

12. How do I record a cancellation?

A: Individual: When completing the *Service Record*, select **Cancelled** from the *Session Type*. You should record the planned duration of the session in the *Start Time* and *End Time* fields. You don't have to record *Language of Service*, *Service Location*, *Service Description* or *Progress Indicator*. You should document in the *Session Notes* the reason for the cancellation. You must certify and save all cancellations.

Group: For cancelled group sessions, select **Cancelled** from the *Session Type*. Enter the *Actual Group Size* as indicated on each student's IEP and the time you planned to hold the session in the *Start Time* and *End Time* fields. You don't have to record *Language of Service*, *Service Location*, *Service Description* or *Progress Indicator*. You should document in the *Session Notes* the reason for the cancellation. You must certify and save all cancellations.

Service Description & CPT Codes

1. How are CPT codes generated?

A: CPT Codes will display based on the *Grouping* value. Only relevant CPT Codes will be listed when *Individual* is selected from the *Grouping* field; and only relevant CPT Codes will be listed when *Group* is selected from the *Grouping*

field.

2. Do I need to select CPT codes if I'm providing Counseling Services?

A: CPT codes for Counseling Services are currently optional.

3. When only one CPT code is listed for selecting, why do I need to check the box? Can't it be automatically checked?

A: You need to select the CPT code in order to certify and save the record.

4. What Service Description must an Occupational Therapist or a Physical Therapist choose when providing group therapy to a group of 2 or more students?

A: When providing OT or PT group therapy to 2 or more students at the same time, OT and PT providers must use the *Service Description: Group therapeutic Procedure – CPT code 97150* only.

Paraprofessionals

1. Are Paraprofessionals required to create service records for services provided?

A: Paraprofessionals are required to record mandated services.