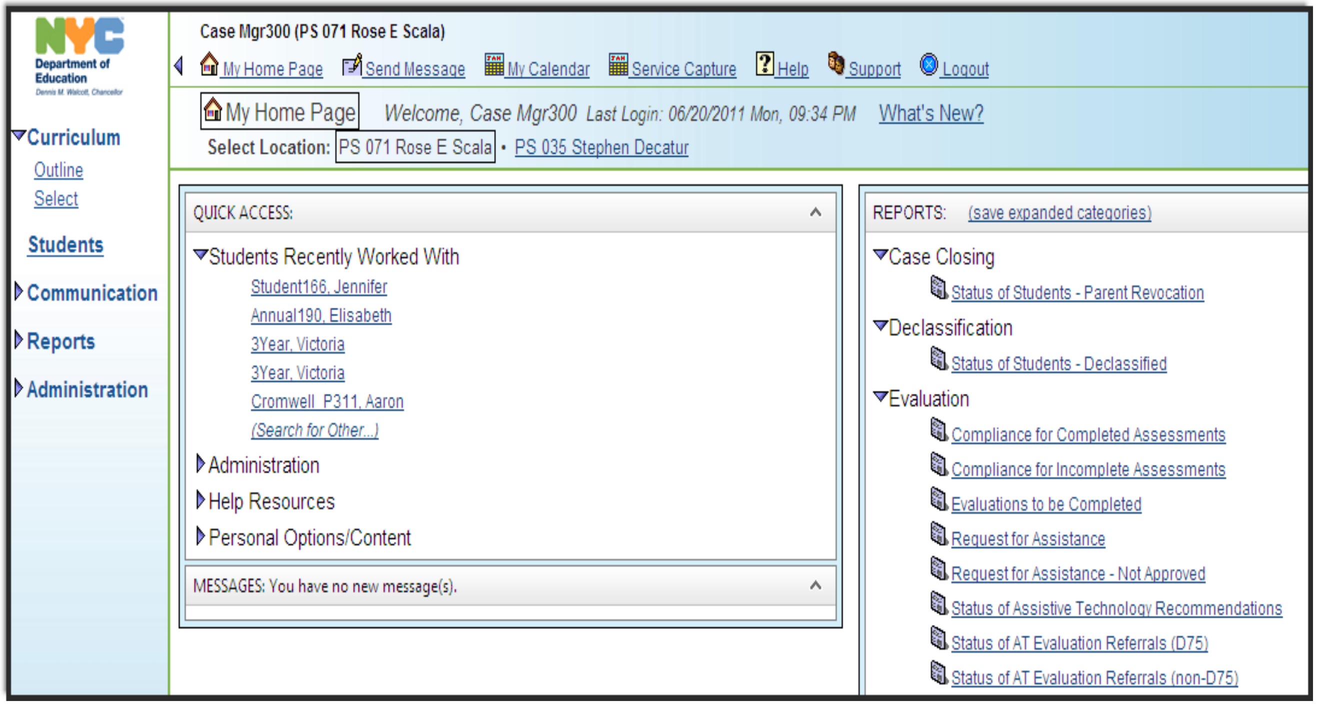


SESIS Encounter Attendance for OT/PT Providers

Today's Agenda

- Introduction
- Learning Objectives
- Website Resources for Encounter Attendance
- Student Caseload
- Encounter Attendance

Introduction

This training session introduces the related service documentation capabilities in SESIS and demonstrates this functionality in the SESIS training environment

Learning Objectives

By the end of this presentation you should be familiar with the following:

- Accessing training and reference materials on the SESIS web portal and in the SESIS tool
- Logging into SESIS
- Understanding the uses of the Student Caseload
- Accessing student records from the Student Caseload
- Recording services provided to a student in the Service Capture Calendar
- Reviewing Encounter Attendance reports

Website Resources for Encounter Attendance

Detailed training and reference materials for Student Caseload and Encounter Attendance are available on the SESIS portal including:

- Job aids
- Placemats
- Frequently-asked questions (FAQs)
- Computer-based training
- Training guides
- Recorded brown bag

To access the SESIS portal:

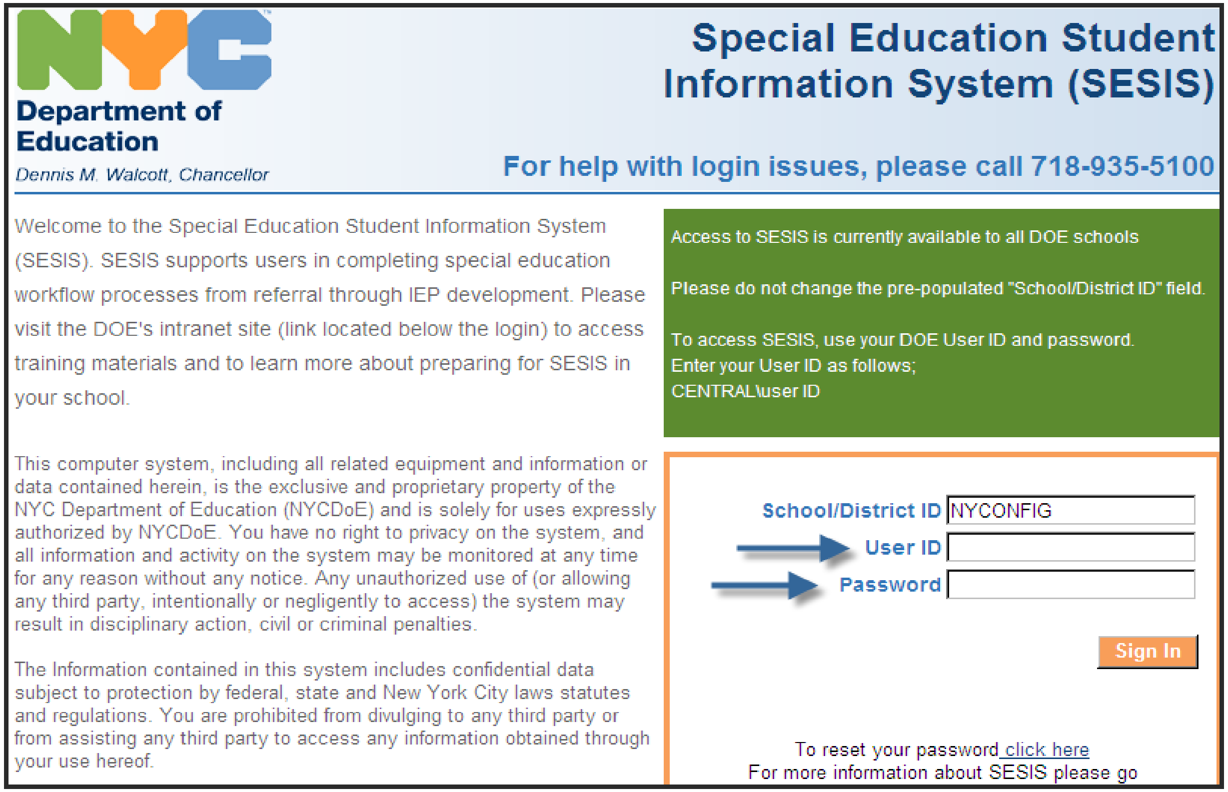
From a computer on a DOE network: http://intranet.nycboe.net/SESIS

From any other computer, use your Outlook password and login to:
https://portal.nycenet.edu/SESIS

For non-DOE staff:
http://schools.nyc.gov/Academics/SpecialEducation/EducatorResources/SESIS_NonDOE.htm

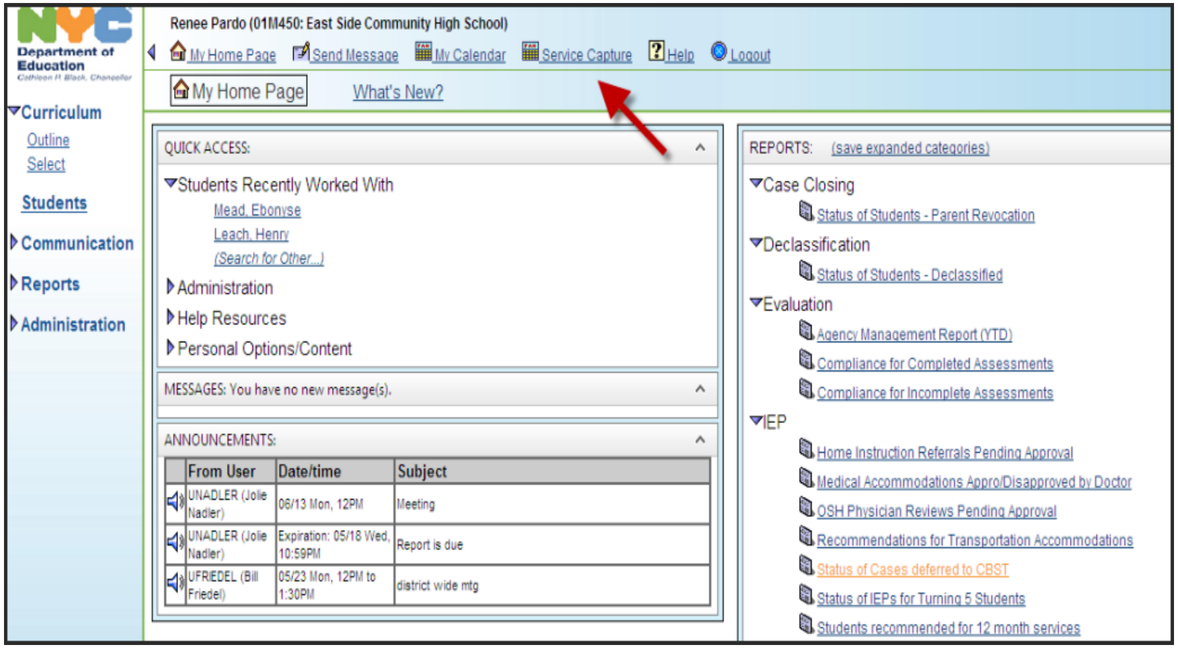
Logging into SESIS

Encounter Attendance requires logging in to SESIS (https://sesis.nycenet.edu). Use your personal user ID and password to log in.



SESIS Homepage: Student Caseload and Encounter Attendance

- The **Service Capture** link enables documenting services which have been provided to a student.
- The **My Student Caseload** section (pictured on the next slide) identifies in one convenient location those students assigned to you who require related services.



Overview of Caseload Management

- Providers still must record first attendance in the Interactive Voice Response (IVR) system. The student will then appear on the provider's **Student Caseload** within 48 hours of being first-attended.

- DOE staff have the ability to add to or remove students manually from their caseloads should the caseload be inaccurate.

- SESIS roles with city-wide access can add students to the caseloads of other staff members.

My Student Caseload Edit Select Group: (Entire Caseload)

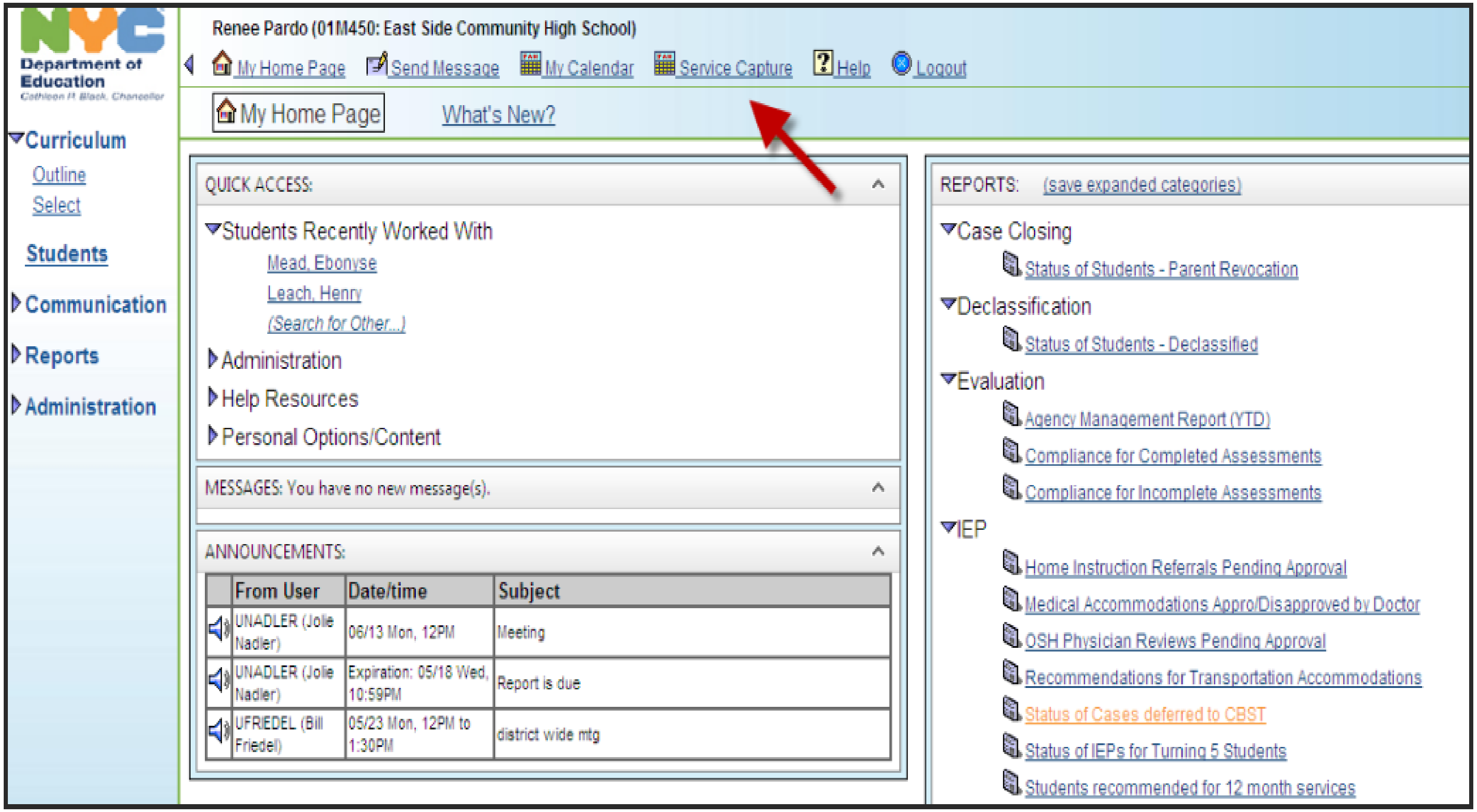
	ID	Last Name	First Name	Process Stage
	31030634	Leach	Henry	
	31016349	Pearson	Zeb	Annual Review
	31056867	Seher	Debbie	Annual Review
	31010484	Smith	Brenda	Annual Review
	223542832	Zimmerman	Zoe	Reevaluation

Overview of Encounter Attendance

- Completed and planned services for students are now input on-line into the **Service Capture** calendar in SESIS.
- Sessions can be input into the **Service Capture** calendar in past, current and future months.
- Sessions can be input for one student for one or multiple days, and multiple students (group) for one or multiple days.
- The **Service Capture** calendar:
  - Lists all students to whom you will provide services (your student "caseload")
  - Displays the current month's calendar and shades non-service dates in grey
  - Utilizes color coding to indicate the status of the service record, once input
  - Offers multiple viewing and printing options
  - Provides Encounter Attendance reports

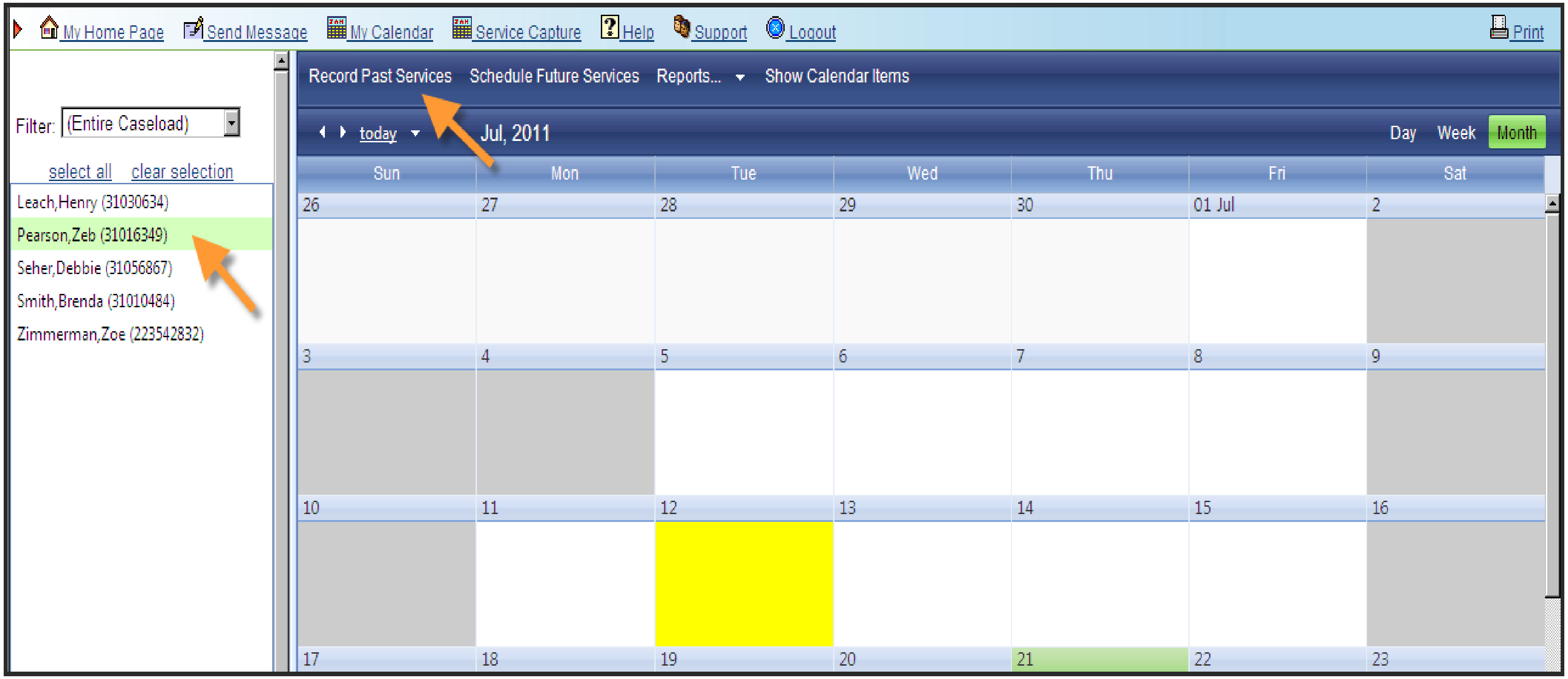
Overview of Encounter Attendance

The **Service Calendar** is accessed by clicking on the **Service Capture** link on the homepage.



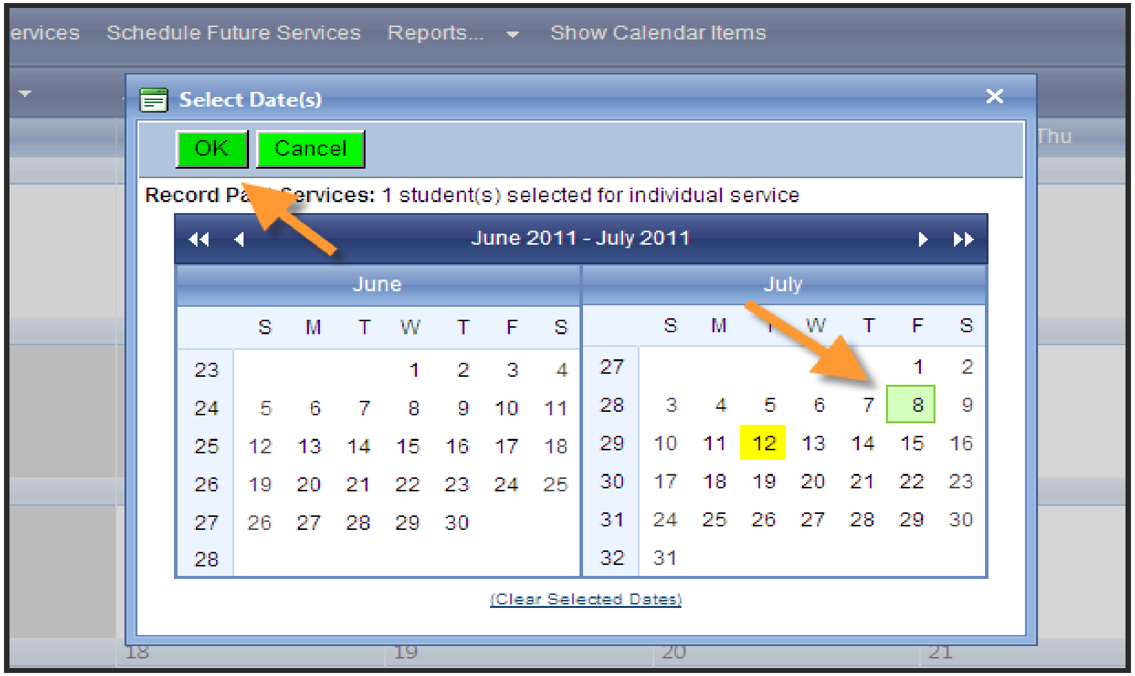
Recording a Past Service for One Student (Step One)

Once in the **Service Calendar**, click on a student in your Caseload. The student name will highlight in green.



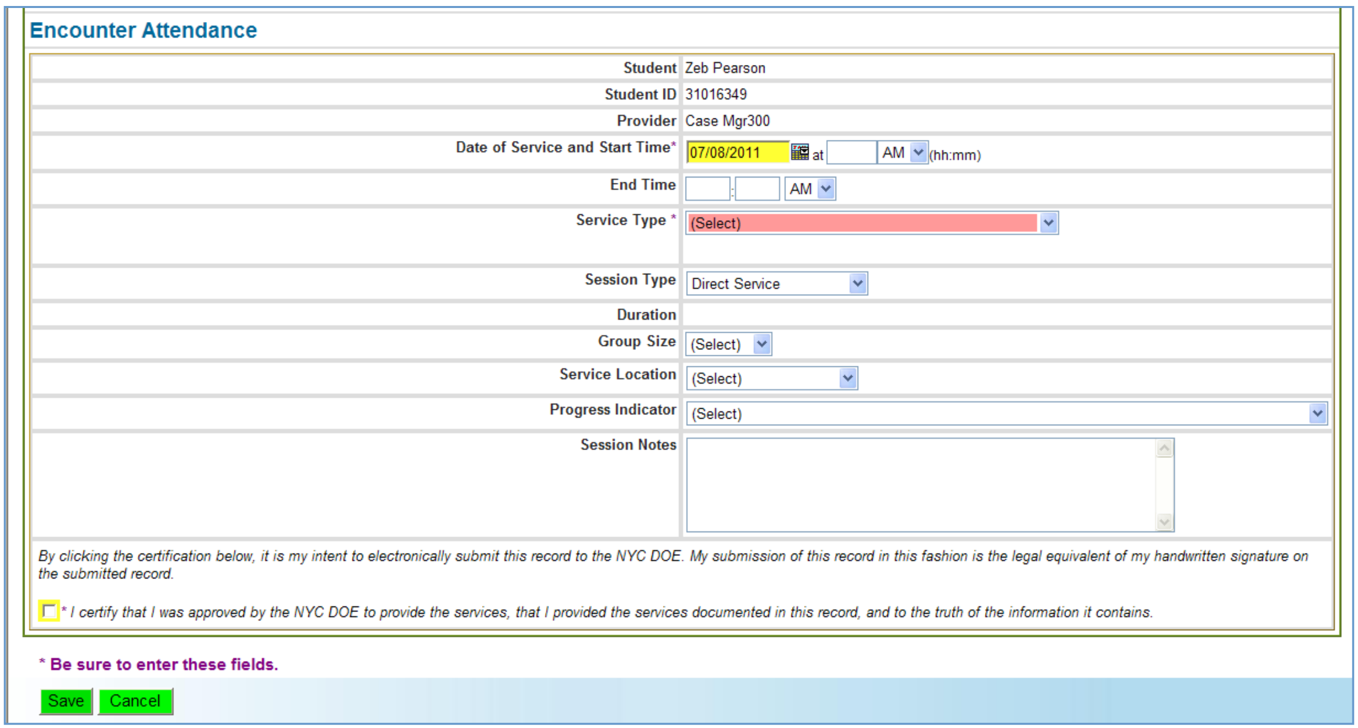
Recording a Past Service for One Student (Step Two)

- Click the **Record Past Services** link.
- Click the date you want to record the past service. The date will highlight in green.
- Click **OK** to display the **Service Record** input form.



Recording a Past Service for One Student (Step Three)

- The Encounter Attendance **Service Record** form displays to input, certify and save the service provided to the student.
- Use the calendar icon, dropdown menus and text boxes to capture all aspects of the service provided.



Encounter Attendance

Student	Zeb Pearson
Student ID	31016349
Provider	Case Mgr300
Date of Service and Start Time*	07/08/2011 at : AM (hh:mm)
End Time	: AM
Service Type *	(Select)
Session Type	Direct Service
Duration	
Group Size	(Select)
Service Location	(Select)
Progress Indicator	(Select)
Session Notes	

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.

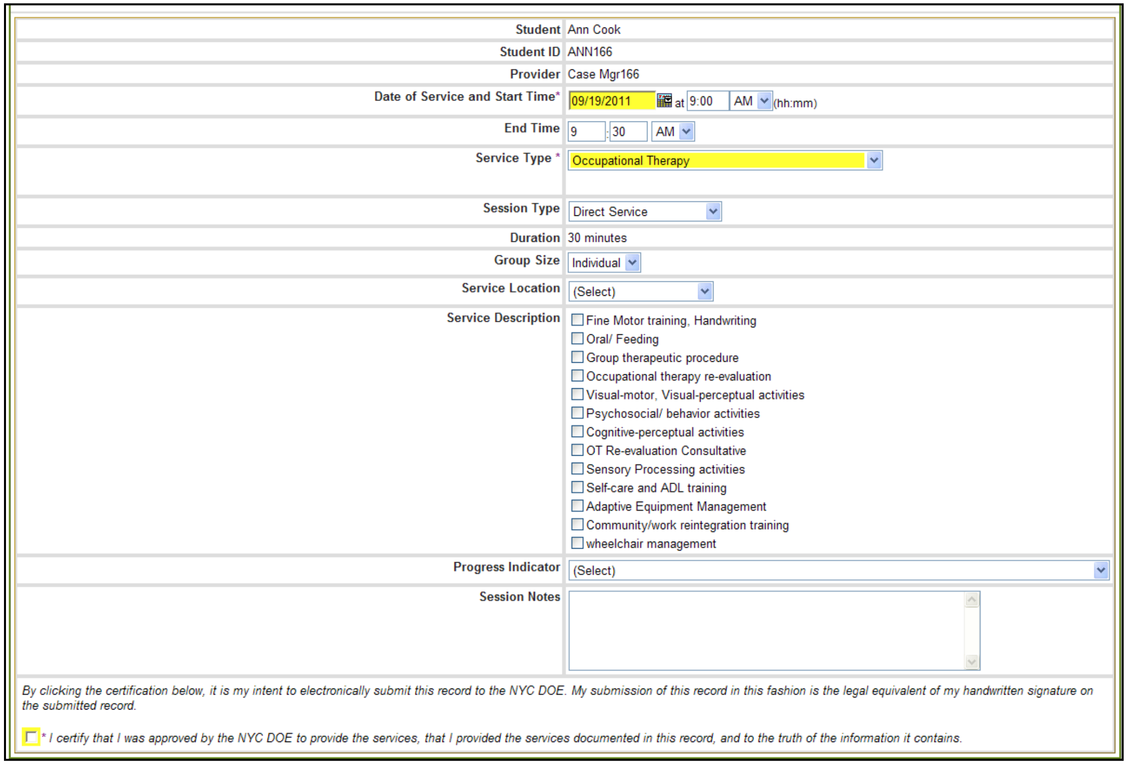
☐ * *I certify that I was approved by the NYC DOE to provide the services, that I provided the services documented in this record, and to the truth of the information it contains.*

*** Be sure to enter these fields.**

Save Cancel

Recording a Past Service for One Student (Example)

- Here is an example of completing an occupational therapy session record.



Student	Ann Cook
Student ID	ANN166
Provider	Case Mgr166
Date of Service and Start Time*	09/19/2011 at 9:00 AM (hh:mm)
End Time	9 : 30 AM
Service Type *	Occupational Therapy
Session Type	Direct Service
Duration	30 minutes
Group Size	Individual
Service Location	(Select)
Service Description	☐ Fine Motor training, Handwriting ☐ Oral/ Feeding ☐ Group therapeutic procedure ☐ Occupational therapy re-evaluation ☐ Visual-motor, Visual-perceptual activities ☐ Psychosocial/ behavior activities ☐ Cognitive-perceptual activities ☐ OT Re-evaluation Consultative ☐ Sensory Processing activities ☐ Self-care and ADL training ☐ Adaptive Equipment Management ☐ Community/work reintegration training ☐ wheelchair management
Progress Indicator	(Select)
Session Notes	

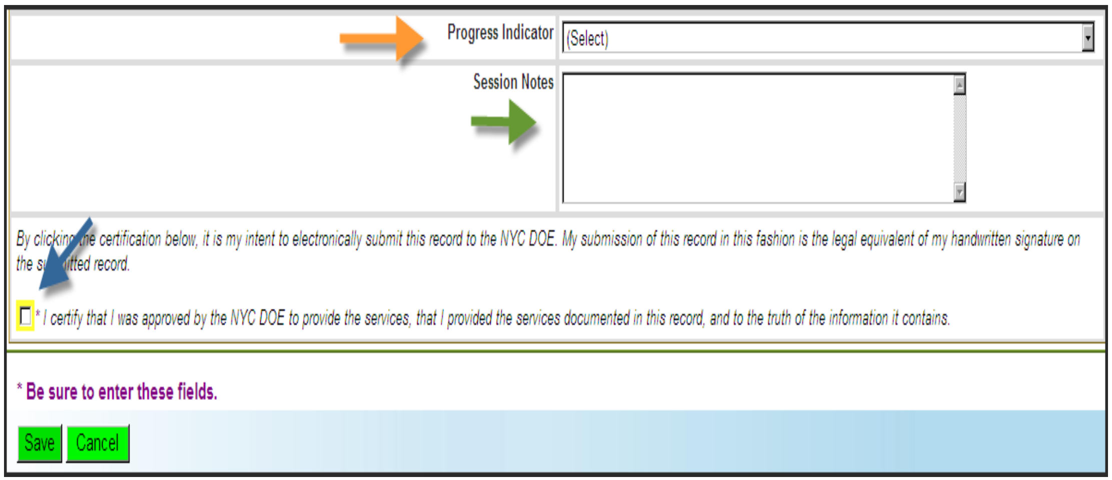
By clicking the certification below, it is my intent to electronically submit this record to the NYC DOE. My submission of this record in this fashion is the legal equivalent of my handwritten signature on the submitted record.

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

- Note: The **Service Description** choices generated are based on the selection made from the **Service Type** field.

Recording a Past Service for One Student (Step Four)

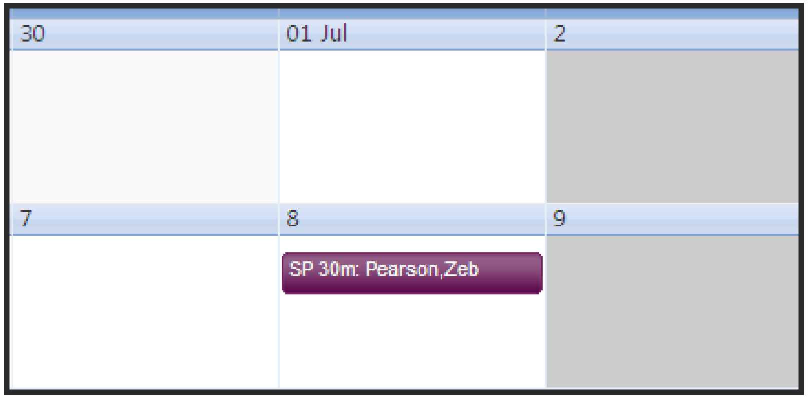
- To complete recording the service, you must indicate progress, add session notes and “certify” the service. Session notes are not required of ESL teachers, SETSS teachers, and Paraprofessionals in order to certify the service. If you have further questions regarding session notes, please reach out to your supervisor.
- Click **Save** when finished.



- Note: When you certify a **Service Record** you should view it as equivalent to attaching an electronic version of your signature.

Recording a Past Service for One Student (Step Five)

- The completed record will appear highlighted in purple on the **Services Calendar**.



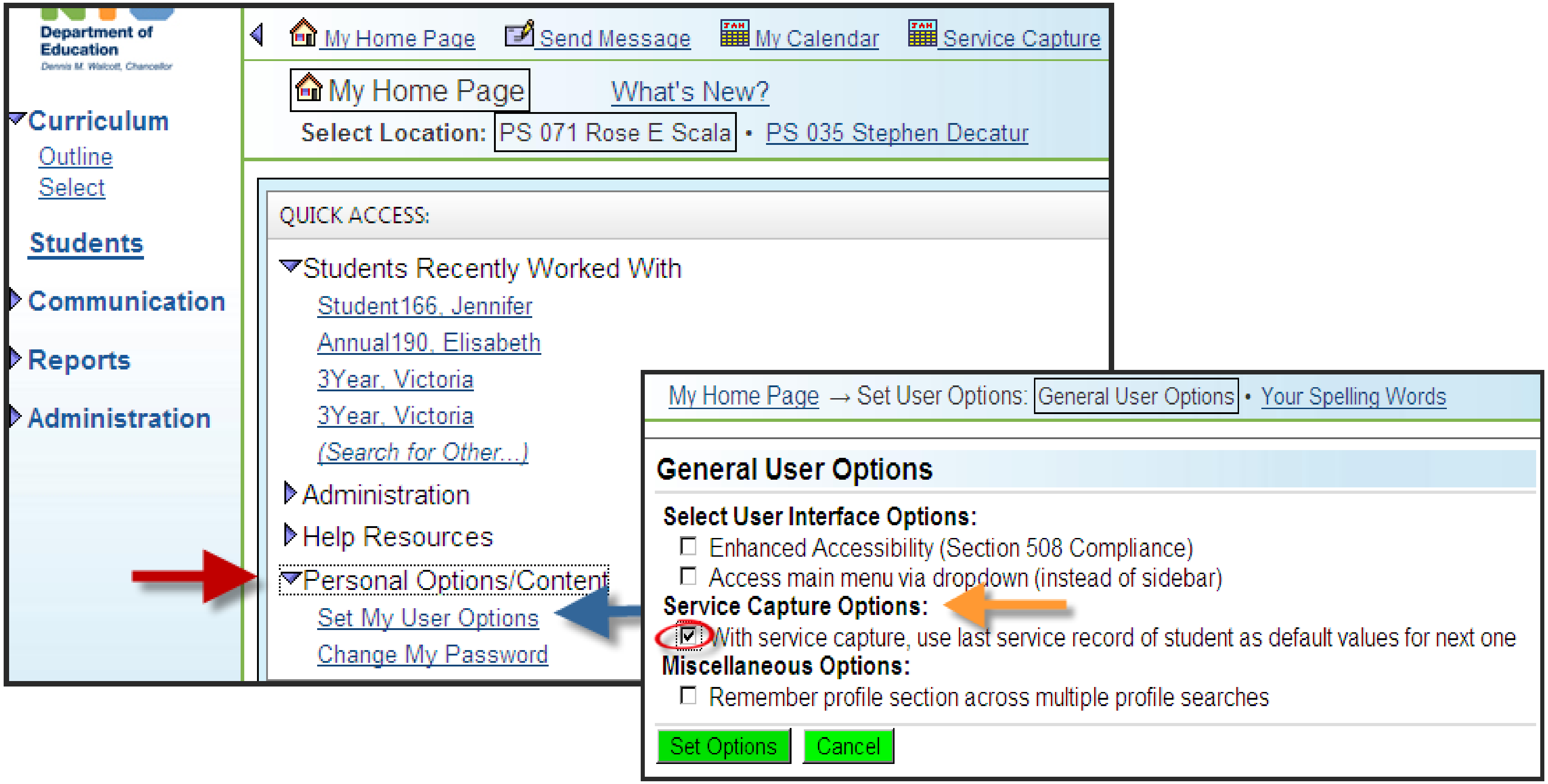
- Once a past service has been certified, it cannot be edited. To make a change the service record must be deleted and recreated.

- Past sessions should be recorded as soon as possible after service delivery.

- Note: To print, delete or edit (non-certified only) service records, double-click on the service record in the calendar and select the appropriate link on the **Actions:** toolbar.

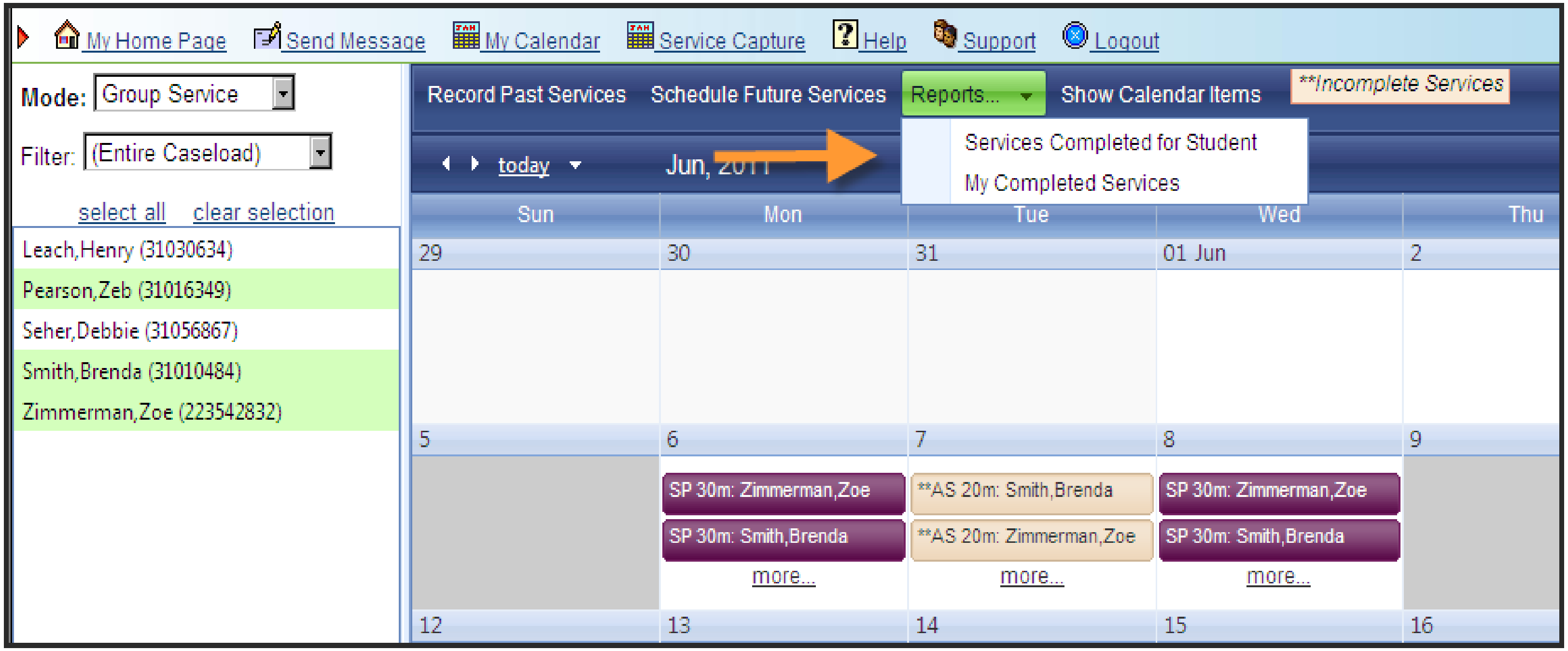
Recording a Past Service

To have SESIS pre-populate fields on the next **Service Record** for a student, set options in the **Personal Options/Content** link on your SESIS homepage.



Overview of Encounter Attendance Reports

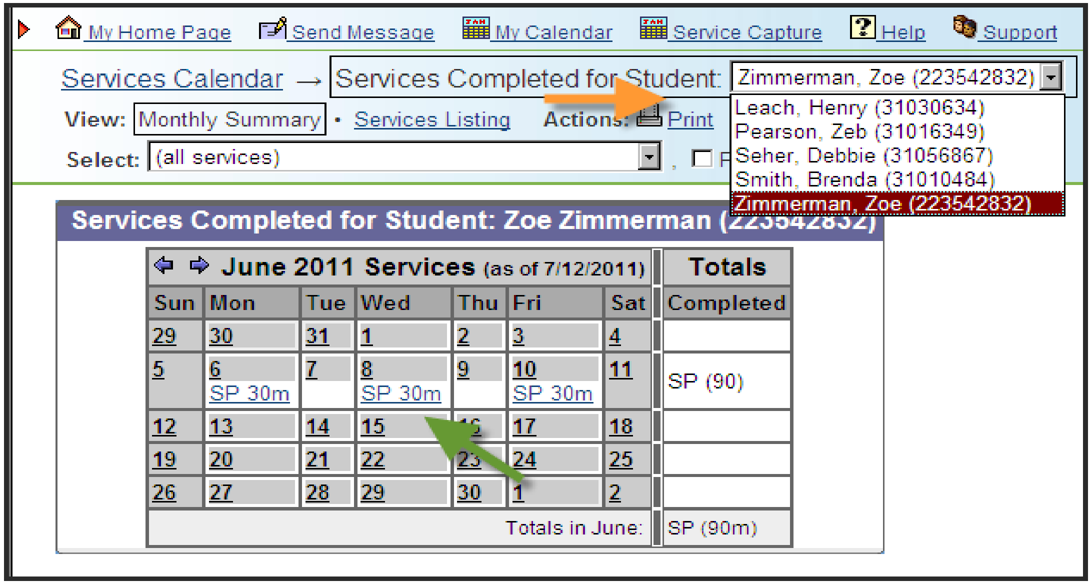
- Two Encounter Attendance reports can be viewed or printed:
  - **Services Completed for Student**
  - **My Completed Services**



- Use the **Reports** dropdown menu to select the desired report.

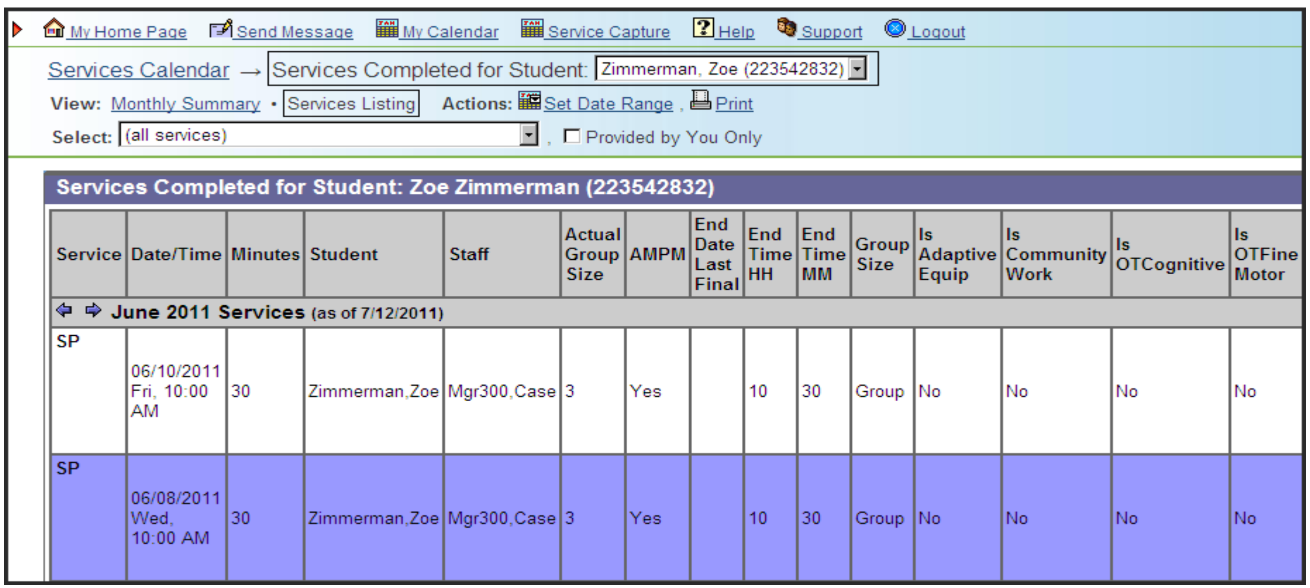
Encounter Attendance Reports: Services Completed for Student

- This report indicates all certified services for a student in a monthly calendar format.
- The report totals the number of minutes of service provided to a student.
- Use the dropdown menu to select the desired student from the Caseload.
- Use the **Select:** dropdown to filter services for only one type of service.
- Use the **Provided by You Only** checkbox to view your completed services.



Encounter Attendance Reports: Services Completed for Student

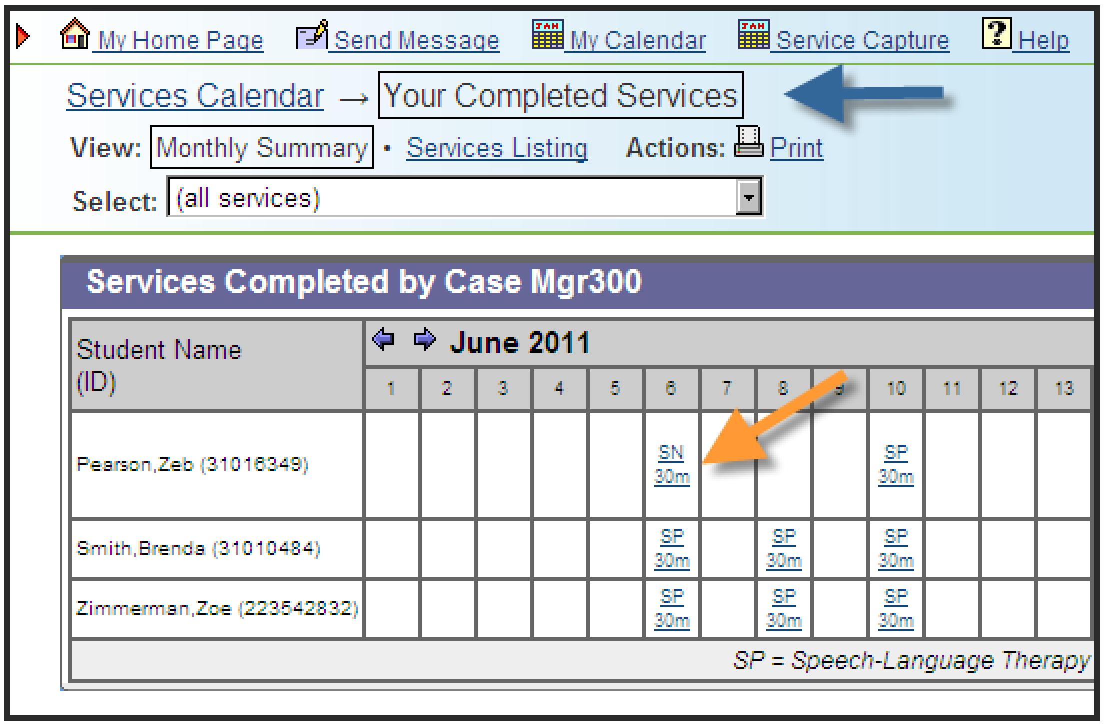
- Use the **Services Listing** link to view **Service Records** in a columnar format, as seen below.
- This view allows you to see all of your **Session Notes**, **Progress Indicators** and **Service Descriptions** over time for the selected student.
- The **Set Date Range** link allows you to restrict the report to a specific period.



Service	Date/Time	Minutes	Student	Staff	Actual Group Size	AMPM	End Date Last Final	End Time HH	End Time MM	Group Size	Is Adaptive Equip	Is Community Work	Is OTCognitive	Is OTFine Motor
June 2011 Services (as of 7/12/2011)														
SP	06/10/2011 Fri, 10:00 AM	30	Zimmerman,Zoe	Mgr300,Case	3	Yes		10	30	Group	No	No	No	No
SP	06/08/2011 Wed, 10:00 AM	30	Zimmerman,Zoe	Mgr300,Case	3	Yes		10	30	Group	No	No	No	No

Encounter Attendance Reports: Your Completed Services

- The **Your Completed Services** report shows all services you have certified.
- It also can be viewed as a listing of all services and sorted by student or service.



Encounter Attendance for Group Sessions

- The process for recording services for a group of students differs from that of recording services for a single student in that multiple students are selected in the **Services Calendar** before the session date is selected.

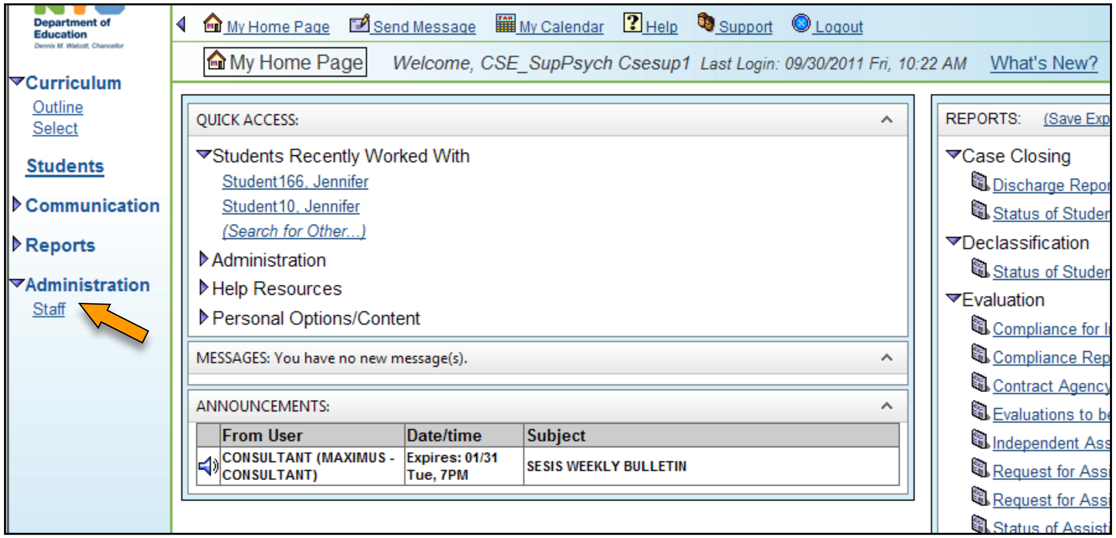
- When a group session is input, SESIS creates individual sessions on that date in the calendar for each student in the group. Individual **Service Records** will be completed for each group member to record their participation in the group.

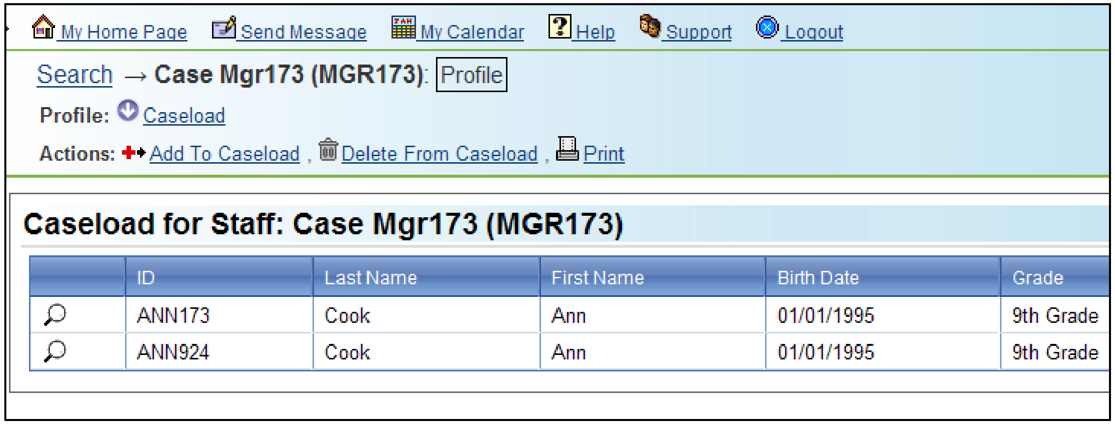
- The process of recording multiple sessions for either a single student or for a group of students provides a shortcut to expedite the input:
  - Complete information that will be common to all the sessions. This information will then be duplicated to all of the student **Service Records**.
  - Review and save the **Service Record** for each individual session (in case the details for one session may differ from all the rest).

Department of Education

Encounter Attendance for OT/PT Supervisors

- Supervisors do not have a **My Student Caseload** or access to the **Service Capture** calendar.
- Supervisors do have visibility to a provider's caseload via the **Caseload** section of the provider's **Profile** in SESIS.





Encounter Attendance for OT/PT Supervisors

- Supervisors can see all providers servicing a student via the **Caseload** section of the student **Profile**.

- Supervisors can also see completed and planned encounter attendance **Service Records** input into the **Services Calendar** via the **Service Records** section of the student **Profile.**

- Click on the magnifying glass icon located in the left margin of the **Service Record** row to view the details.

Search → **Ann Cook (ANN173)**: Profile • Documents • Repository • Events

Profile: Service Records

Actions: Print

Service Records for Student: Ann Cook (ANN173)

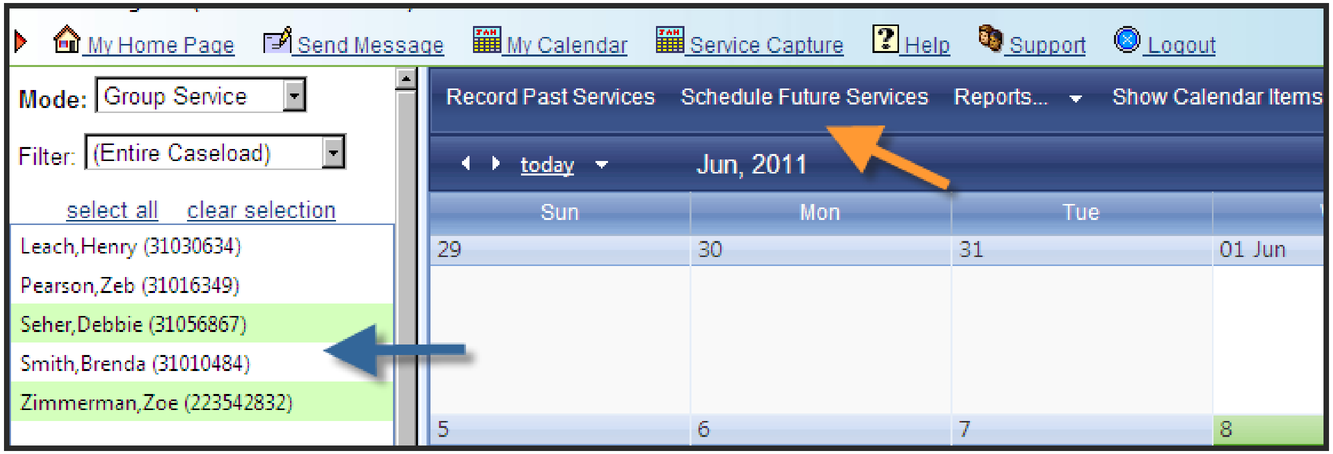
	Student	Staff	Service Date Time	Service	Duration Minutes	Completed
	Cook,Ann	Mgr173,Case	10/03/2011, 10:00 AM	Occupational Therapy	30	No
	Cook,Ann	Mgr173,Case	09/09/2011, 09:00 AM	Physical Therapy	30	Yes
	Cook,Ann	Mgr173,Case	09/07/2011, 09:00 AM	Occupational Therapy	30	Yes

Overview of Scheduling Future Services

- SESIS allows scheduling of future services up to two months at a time.
- As with past services you can schedule future services for one student on one or multiple days, or multiple students on one or multiple days.
- Once the service has been delivered, providers can edit the **Service Record** to complete the remaining fields in the form (e.g. **Progress Indicator**, **Session Notes**, etc), certify and save the record.
- Providers cannot view scheduled future services by other providers. Providers should continue to work together to schedule future service deliveries that do not conflict.

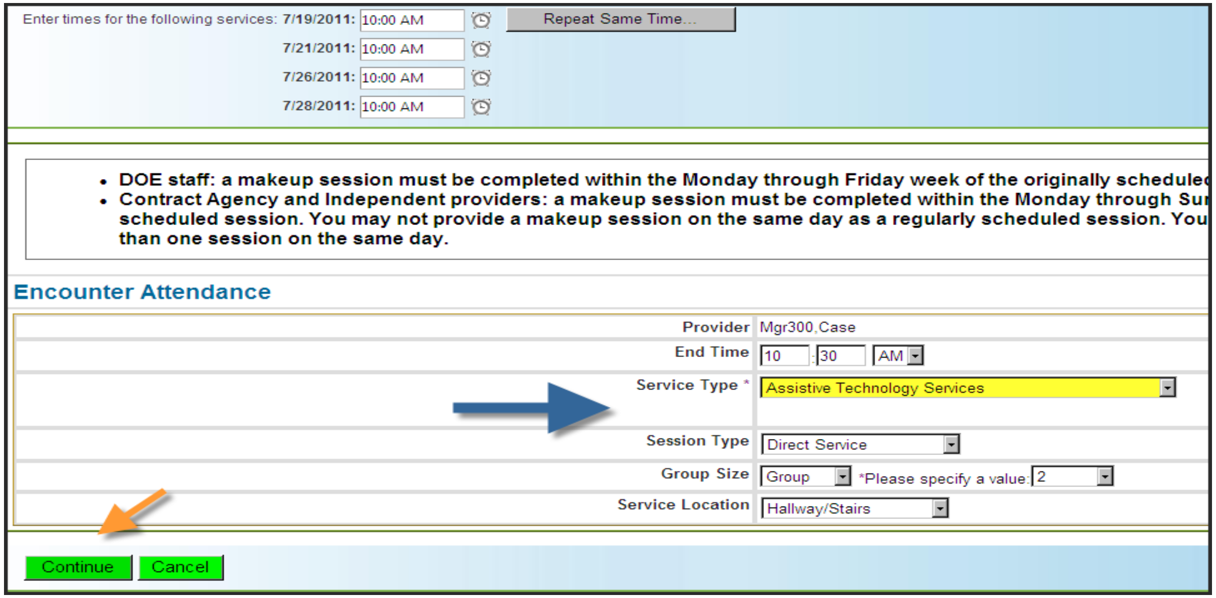
Scheduling Future Services (Step One)

- To schedule an individual session with a single student, select the student from the caseload and click the **Schedule Future Services** link.
- To schedule a group session, click on the first student to attend the session and then select the remaining members per the following:
  - For students located adjacently in the list, depress the Shift key on the keyboard and click the last group member
  - For students in the group session not listed adjacently in the list, depress the Ctrl (PC) key or Command (Mac) and click on each student member



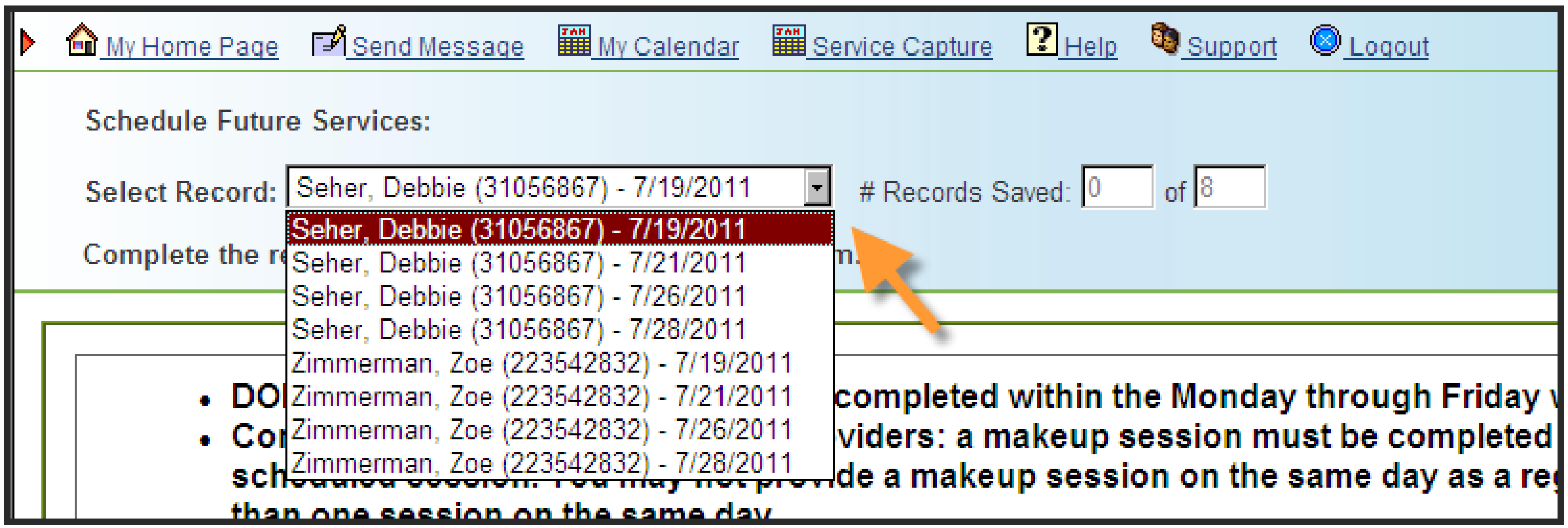
Scheduling Future Services (Step Two)

- Click on each date when a session will occur in the two months displayed and click **OK**.
- Each selected date appears at the top of the screen, as seen below.
- Complete this screen with information to be replicated in each of the selected dates (e.g. **Start Time**, **End Time**, **Service Type**) and click **Continue**.



Scheduling Future Services (Step Three)

- To record the participation of each member of the group, SESIS provides individual **Service Records** to be completed for each group member.
- Use the dropdown menu, as pictured below, to select a date for an individual student and make any updates specific to this session.



- Click **Save** when finished. Repeat this process for each date for each student.

Scheduling Future Services (Step Four)

- Your scheduled future services will appear (highlighted in a peach color) on the **Services Calendar**.
- When the service has been delivered and the **Service Record** is to be certified, double click on the **Service Record** in the calendar and click on the **Edit** link.
- Enter progress, **Session Notes** (if required) and certify the record. The completed record will be highlighted in purple on the calendar.