



SEGIS Training Guide

Encounter Attendance

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Encounter Attendance

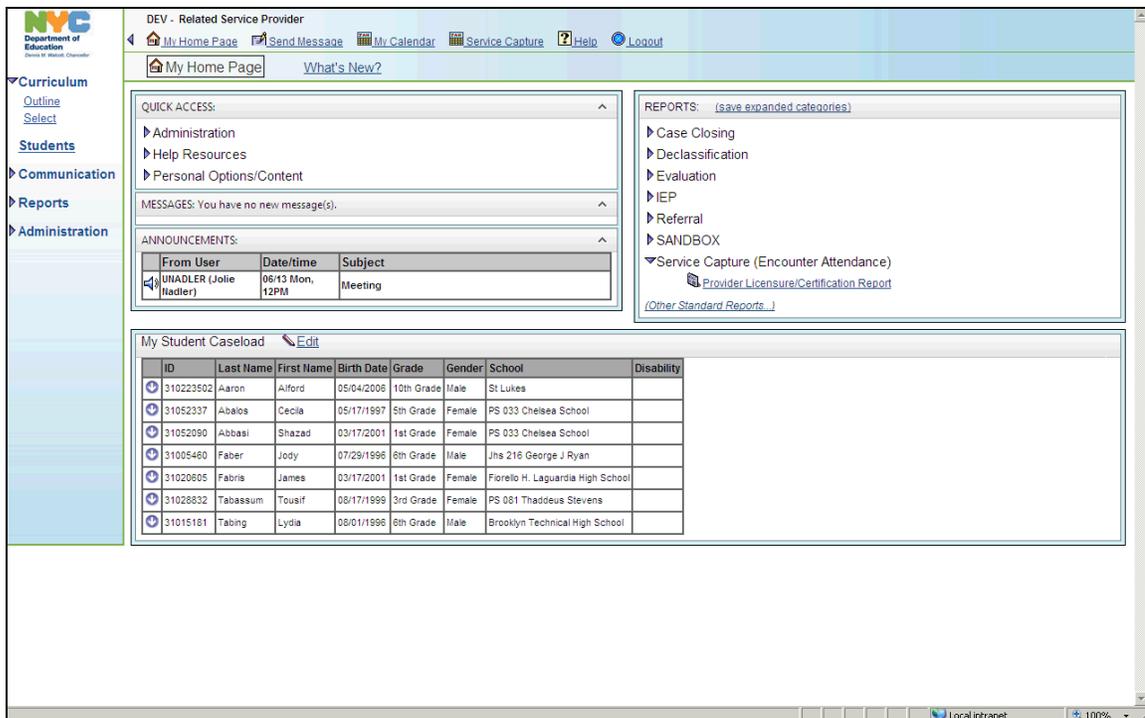
Encounter Attendance

Viewing/Editing Your Caseload

- Caseloads are located on your SESIS homepage at the bottom of the page.

Procedure

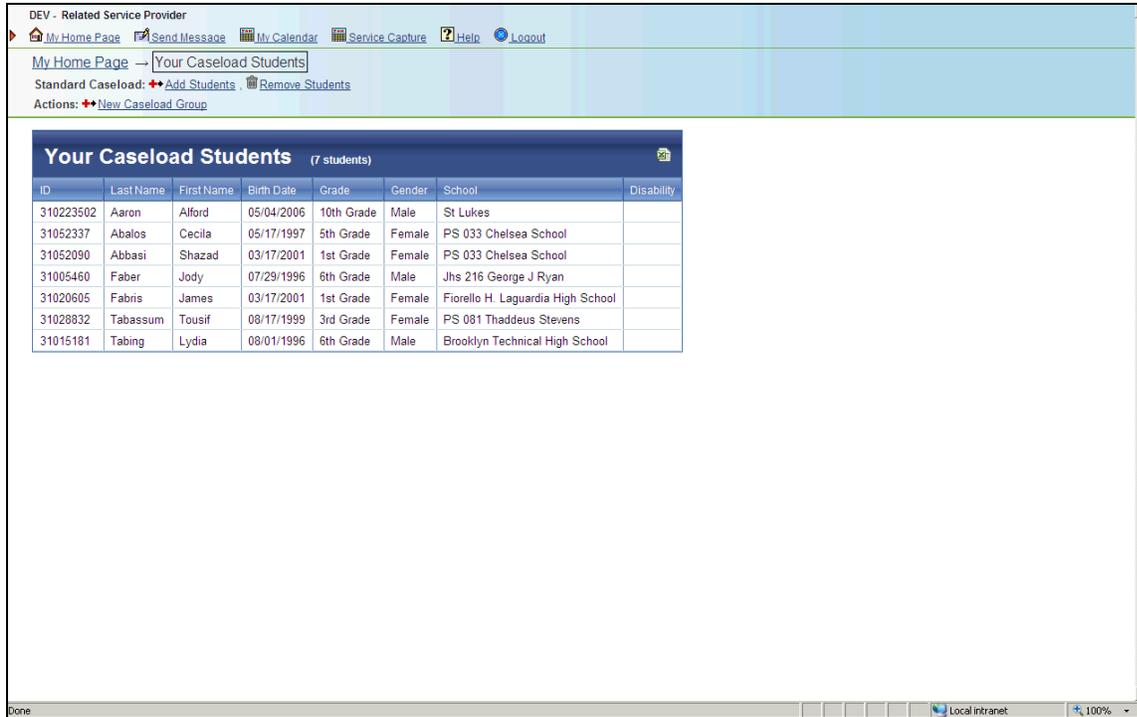
This lesson will guide you through the process of viewing and editing your caseload.

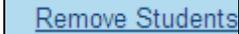


The screenshot shows the SESIS web application interface. At the top, there is a navigation bar with links for 'My Home Page', 'Send Message', 'My Calendar', 'Service Capture', 'Help', and 'Logout'. Below this, there is a 'My Home Page' section with 'What's New?' and a 'QUICK ACCESS' section with links to 'Administration', 'Help Resources', and 'Personal Options/Content'. There is also a 'MESSAGES' section indicating no new messages and an 'ANNOUNCEMENTS' section with one announcement from Jolie Hadler. On the right, there is a 'REPORTS' section with various report categories like 'Case Closing', 'Declassification', 'Evaluation', 'IEP', 'Referral', 'SANDBOX', and 'Service Capture (Encounter Attendance)'. The main content area is titled 'My Student Caseload' and contains a table with the following data:

ID	Last Name	First Name	Birth Date	Grade	Gender	School	Disability
310223502	Aaron	Aitford	05/04/2006	10th Grade	Male	St Lukes	
31052337	Abalos	Cecilia	05/17/1997	5th Grade	Female	PS 033 Chelsea School	
31052090	Abbasi	Shazad	03/17/2001	1st Grade	Female	PS 033 Chelsea School	
31005460	Faber	Jody	07/29/1998	8th Grade	Male	Jhs 216 George J Ryan	
31020605	Fabris	James	03/17/2001	1st Grade	Female	Fiorello H. Laguardia High School	
31028832	Talassum	Tousif	08/17/1999	3rd Grade	Female	PS 081 Thaddeus Stevens	
31015181	Tabing	Lydia	08/01/1998	8th Grade	Male	Brooklyn Technical High School	

Step	Action
1.	To view a student from your caseload, click the dropdown arrow next to the student's name. 
2.	You then have the option to navigate to the student's Service Calendar, Profile, or Documents.
3.	To add students to your caseload, click the Edit link. 



Step	Action
4.	Click the Add Students link. 
5.	Use the Student Quick Search Form to search for students to add to your caseload. Enter " Betts " in the Last Name field.
6.	Click the Search button. 
7.	This is a list of all results that match our search criteria. Click the checkbox next to the student you wish to add to your caseload.
8.	Click to select Stephanie Betts . <input type="checkbox"/>
9.	Click the Add Students Marked Above to Standard Caseload button.
10.	Click the Your Caseload Students link. 
11.	The student we added, Stephanie Betts, is now on our caseload.
12.	To remove a student from your caseload, click the Remove Students link. 

Step	Action
13.	Click the checkbox next to the name of the student you wish to remove from your caseload. Click to select Cecila Abalos . <input type="checkbox"/>
14.	Click the Remove Students Marked Below from Standard Caseload button.
15.	The student is no longer on your caseload list. Click the Your Caseload Students link. Your Caseload Students
16.	To organize your caseload students into groups, click the New Caseload Group link. + New Caseload Group



Step	Action
17.	Enter the appropriate information into the Group Name field. Enter " Speech ".
18.	Click to select this student. <input checked="" type="checkbox"/>

Step	Action
19.	Click to select this student. <input checked="" type="checkbox"/>
20.	Click to select this student. <input checked="" type="checkbox"/>



Step	Action
21.	Click the Accept button. <input checked="" type="button" value="Accept"/>
22.	You are now viewing the new caseload group "Speech."
23.	Click the dropdown to see Your Caseload Students list. <input type="text" value="Speech"/>
24.	You can now choose to view your entire caseload or your separate caseload group by selecting from this dropdown. Click to view the Entire Caseload . <input type="text" value="(Entire Caseload)"/>
25.	You are now viewing your entire caseload, including the students you added to the Speech group.
26.	This concludes the lesson on viewing/editing your caseload. End of Procedure.

Scheduling Future Services

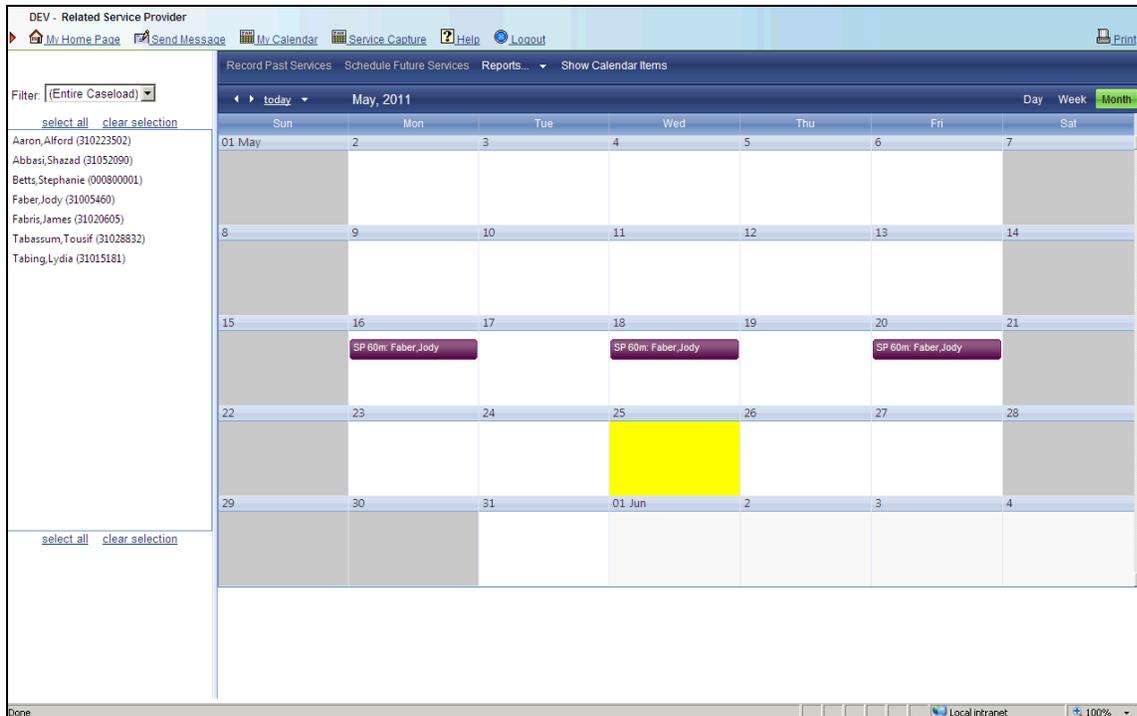
- Future sessions can be scheduled up to five months in advance and can be scheduled for multiple students, including individual as well as group sessions.
- Indicating progress, completing session notes and certifying the session should occur after the service has been completed.

Procedure

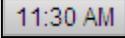
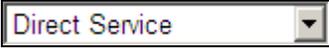
This lesson will guide you through the process of scheduling future services.

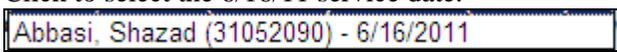
ID	Last Name	First Name	Birth Date	Grade	Gender	School	Disability
310223502	Aaron	Aiford	05/04/2006	10th Grade	Male	St Lukes	
31052090	Abbasi	Shazad	03/17/2001	1st Grade	Female	PS 033 Chelsea School	
000800001	Betts	Stephanie	06/23/2000	4th Grade	Female	PS 071 Rose E Scala	
31005460	Faber	Jody	07/29/1998	8th Grade	Male	Jhs 216 George J Ryan	
31020695	Fabris	James	03/17/2001	1st Grade	Female	Fiorello H. Laguardia High School	
31028932	Tabassum	Tousif	08/17/1999	3rd Grade	Female	PS 081 Thaddeus Stevens	
31015181	Tabing	Lydia	08/01/1998	8th Grade	Male	Brooklyn Technical High School	

Step	Action
1.	Click the Service Capture link from your homepage to open your service capture calendar.



Step	Action
2.	Click the name of the student for which you wish to record services. Click to select Abbasi,Shazad .
3.	Click the Schedule Future Services link.
4.	Use this calendar to select the dates to record service. You may select multiple dates.
5.	Click the 2 to select June 2nd.
6.	Click the 16 to select June 16th.
7.	The selected dates are now highlighted in green. Click the OK button.

Step	Action
8.	Click the clock icon to select a service time. 
9.	Click to select 11:30 AM . 
10.	You have selected 11:30AM for the first service date. You may either enter a different time for the second date or repeat the same time. Click the Repeat Same Time button. 
11.	Enter the appropriate information into the End Time field. Enter " 12 ".
12.	Click the Service Type dropdown.
13.	Click to select Counseling Services .
14.	Click the Session Type dropdown. 
15.	Click to select Direct Service . 
16.	Click the Group Size dropdown. 

Step	Action
17.	Click to select Individual . 
18.	Click the Service Location dropdown. 
19.	Click to select Office . 
20.	Click the Continue button. 
21.	Since this is a future service, you will not yet enter the Progress Indicator, Session Notes, or Certification of Services fields.
22.	Click the Save button. 
23.	The service has been saved. Next to the date it is indicated as "Saved" and 1 out of 2 records have been saved.
24.	Click the Select Record dropdown to schedule another service. Click to select the 6/16/11 service date. 
25.	Click the Service Capture calendar to view these records on the calendar. 
26.	The scheduled future service date now appears on the Service Capture calendar.

The screenshot shows a web-based calendar interface for a 'DEV - Related Service Provider'. The interface includes a navigation bar with options like 'My Home Page', 'Send Message', 'My Calendar', 'Service Capture', 'Help', and 'Logout'. Below the navigation bar, there are tabs for 'Record Past Services', 'Schedule Future Services', 'Reports...', and 'Show Calendar Items'. A filter dropdown is set to '(Entire Caseload)'. The calendar itself is for the month of May 2011, with days of the week (Sun to Sat) and dates (01 to 31) displayed. Service records are shown as colored boxes: purple boxes for 'SP 60m: Faber, Jody' on May 16, 18, and 20; and an orange box for '**CS 30m: Abbasi, Shazad' on June 2. A yellow highlight is present on the date 25 of May. The interface also includes 'select all' and 'clear selection' links for the provider list on the left.

Step	Action
27.	Click to view the service details.
28.	You are now viewing the service record details. Use the links on the top navigation toolbar to return to the Service Capture calendar or elsewhere in SESIS.
29.	End of Procedure.

Recording a Service

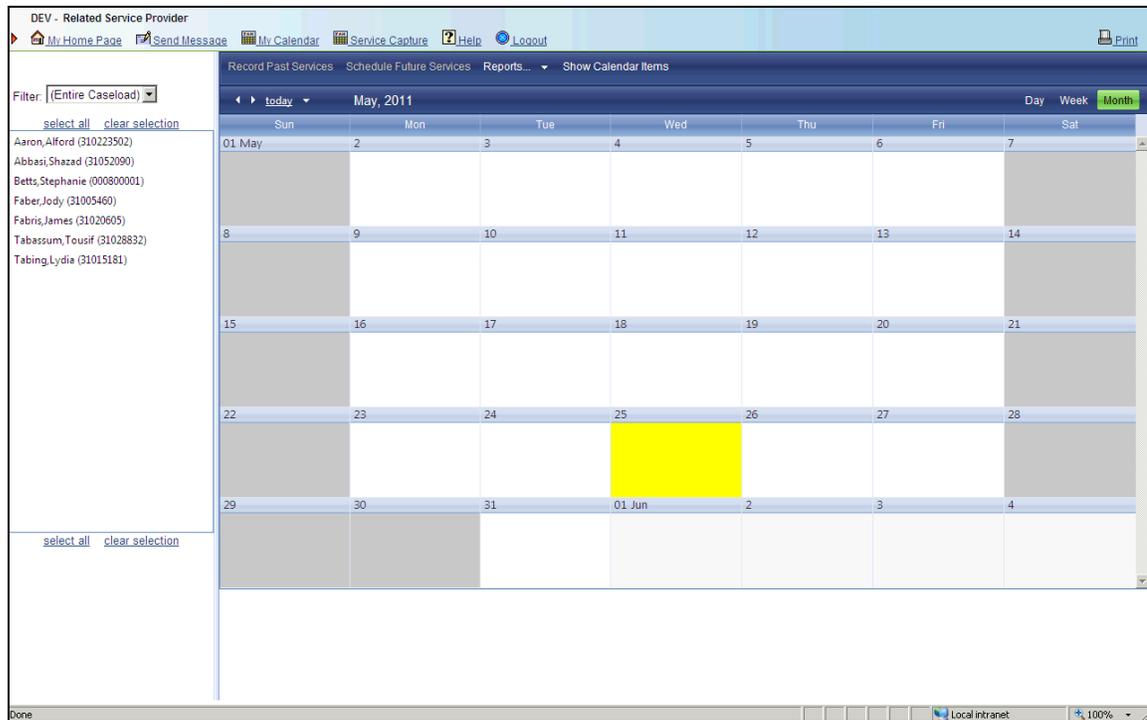
- All services must be completed and certified prior to the 15th of the month following the service.

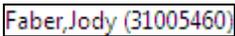
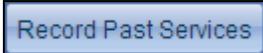
Procedure

This lesson will guide you through the process of recording a service.

ID	Last Name	First Name	Birth Date	Grade	Gender	School	Disability
310223502	Aaron	Aiford	05/04/2006	10th Grade	Male	St Lukes	
31052090	Abbasal	Shazed	03/17/2001	1st Grade	Female	PS 033 Chelsea School	
000800001	Betts	Stephanie	06/23/2000	4th Grade	Female	PS 071 Rose E Scala	
31005460	Faber	Jody	07/29/1998	8th Grade	Male	Jhs 216 George J Ryan	
31020605	Fabris	James	03/17/2001	1st Grade	Female	Fiorello H. Laguardia High School	
31028832	Tabassum	Tousif	08/17/1999	3rd Grade	Female	PS 081 Thaddeus Stevens	
31015181	Tabing	Lydia	08/01/1998	8th Grade	Male	Brooklyn Technical High School	

Step	Action
1.	<p>Click the Service Capture link from your homepage to open your service capture calendar.</p> <p>Alternatively, you can click the Select dropdown button from a student's name that is on your caseload.</p> 



Step	Action
2.	Click the name of the student for which you wish to record services. Click to select Faber, Jody . 
3.	Click the Record Past Services link. 
4.	Use this calendar to select the dates to record service. You may select multiple dates.
5.	Click the 16 to select May 16th. 
6.	Click the 18 to select May 18th. 
7.	Click the 20 to select May 20th. 
8.	The selected dates are now highlighted in green. Today's date is highlighted in yellow.
9.	Click the OK button. 

DEV - Related Service Provider

My Home Page | Send Message | My Calendar | Service Capture | Help | Logout

Record Services: Please enter the common information for the following days, and then click 'Continue':

Enter times for the following services: 5/16/2011: Repeat Same Time...

5/18/2011: [Open the time view popup.](#)

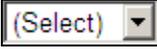
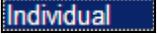
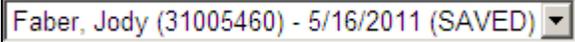
5/20/2011:

Encounter Attendance

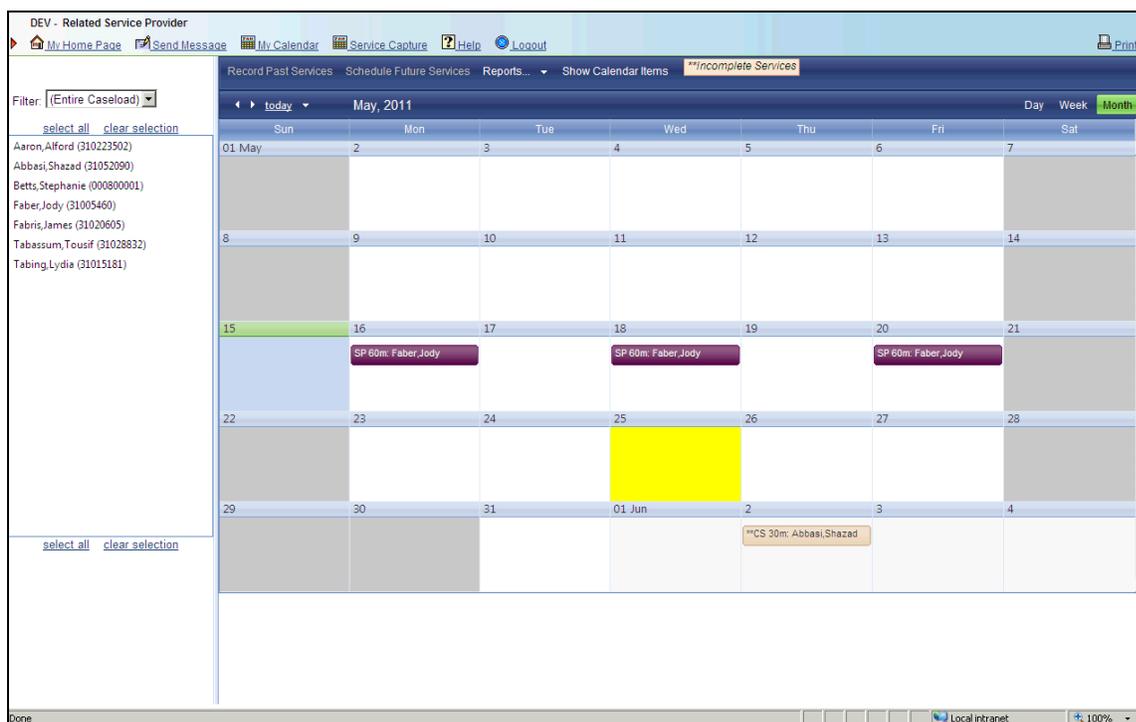
Provider	Provider Related Service
End Time	<input type="text"/> AM
Service Type *	(Select)
Session Type	Direct Service
Group Size	(Select)
Service Location	(Select)

https://sesidev.appsolgrp.com/service/record1.aspx?day=5%2f16%2f2011%2c5%2f18%2f2011%2c5%2f20%2f2011&pt=2&profile=87467&item=ne Local intranet 100%

Step	Action
10.	Click the clock icon to select a service time.
11.	Click to select 9:30 AM .
12.	You have selected 9:30AM for the first service date. You may either enter other times for the other service dates, or repeat the same time for all dates. Click the Repeat Same Time button.
13.	9:30 AM has been entered as the time for all three service dates.
14.	Enter the appropriate information into the End Time field. Enter " 10 ".
15.	Click the dropdown to specify the Service Type . Note that the options on the form will change based on the type of service that is selected from the dropdown list.
16.	Click to select Speech-Language Therapy .
17.	Click the Session Type dropdown.

Step	Action
18.	Click to select Direct Service . 
19.	Click the Group Size dropdown. 
20.	Click to select Individual . 
21.	Click the Service Location dropdown. 
22.	Click to select Therapy Room . 
23.	Click the Voice option under Service Description. <input type="checkbox"/>
24.	Click the Fluency option under Service Description. <input checked="" type="checkbox"/>
25.	Click the Continue button. 
26.	Click the Progress Indicator dropdown.
27.	Click to select Student made partial progress toward goal attainment .
28.	Enter the appropriate information into the Session Notes field. Enter " text here ".
29.	Note: Clicking the checkbox to certify the service will submit the service record to the DOE. Be sure that the information is accurate and truthful before proceeding. All services must be completed and certified prior to the 15th of the month following the service.
30.	Click the checkbox to certify this service. <input type="checkbox"/>
31.	Click the Save button. 
32.	The service has been saved. Next to the date it is indicated as "Saved" and 1 out of 3 records have been saved.
33.	Click the Select Record dropdown to certify another service. 
34.	Click the Select Record dropdown to certify another service. Click to select the 5/18/11 service date.

Step	Action
35.	You are now viewing the service details for the 5/18 service date. Repeat the previous steps to complete the Progress Indicator, Session Notes, and Certifying a Service.
36.	Click the Service Capture calendar to view these records on the calendar. 
37.	The three service dates now appear on the Service Capture calendar.



Step	Action
38.	Click to view the service details. 
39.	You are now viewing the service record details. Use the links on the top navigation toolbar to return to the Service Capture calendar or elsewhere in SESIS.
40.	This concludes the lesson on recording a service. End of Procedure.

Recording/Scheduling Group Services

- All services must be completed and certified prior to the 15th of the month following the service.

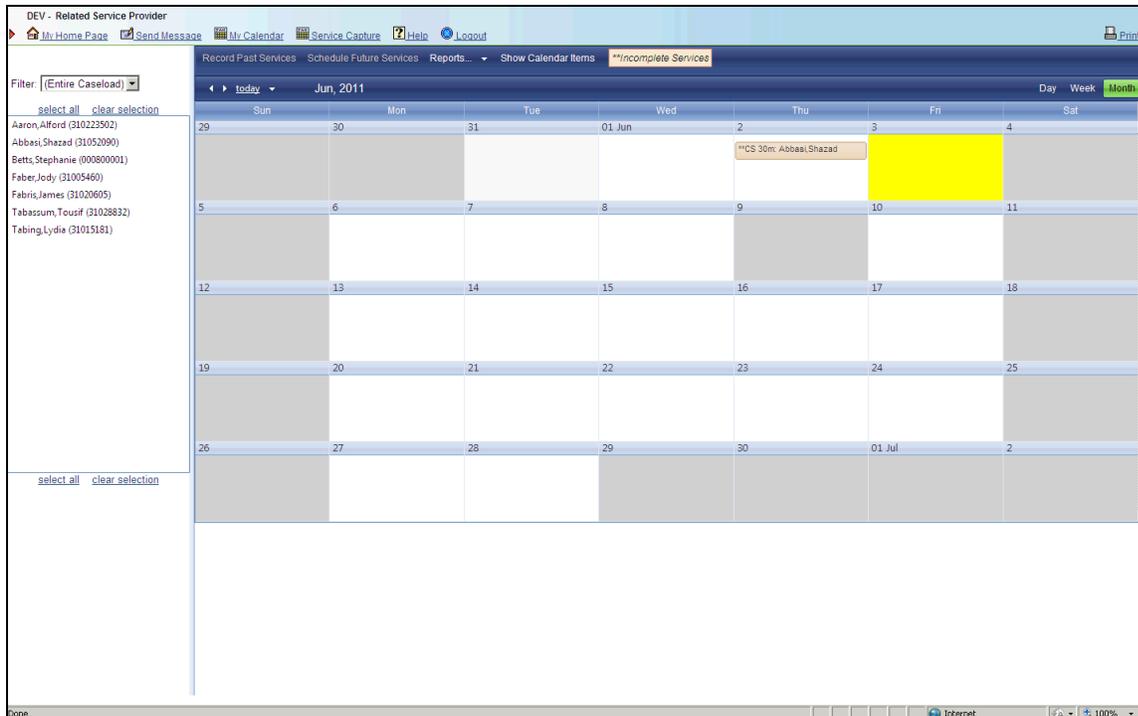
Procedure

This lesson will guide you through the process of recording/scheduling group services.

The screenshot displays the 'My Student Caseload' section of the Service Provider interface. It includes a navigation menu on the left, a top navigation bar with links like 'My Home Page', 'Send Message', 'My Calendar', 'Service Capture', 'Help', and 'Logout'. The main content area features several panels: 'QUICK ACCESS' with links to Administration, Help Resources, and Personal Options/Content; 'MESSAGES' indicating no new messages; 'ANNOUNCEMENTS' with a table of recent messages; and a 'My Student Caseload' table with columns for ID, Last Name, First Name, Birth Date, Grade, Gender, School, and Disability. A 'Select Group' dropdown is set to '(Entire Caseload)'. The table lists seven students with their respective details.

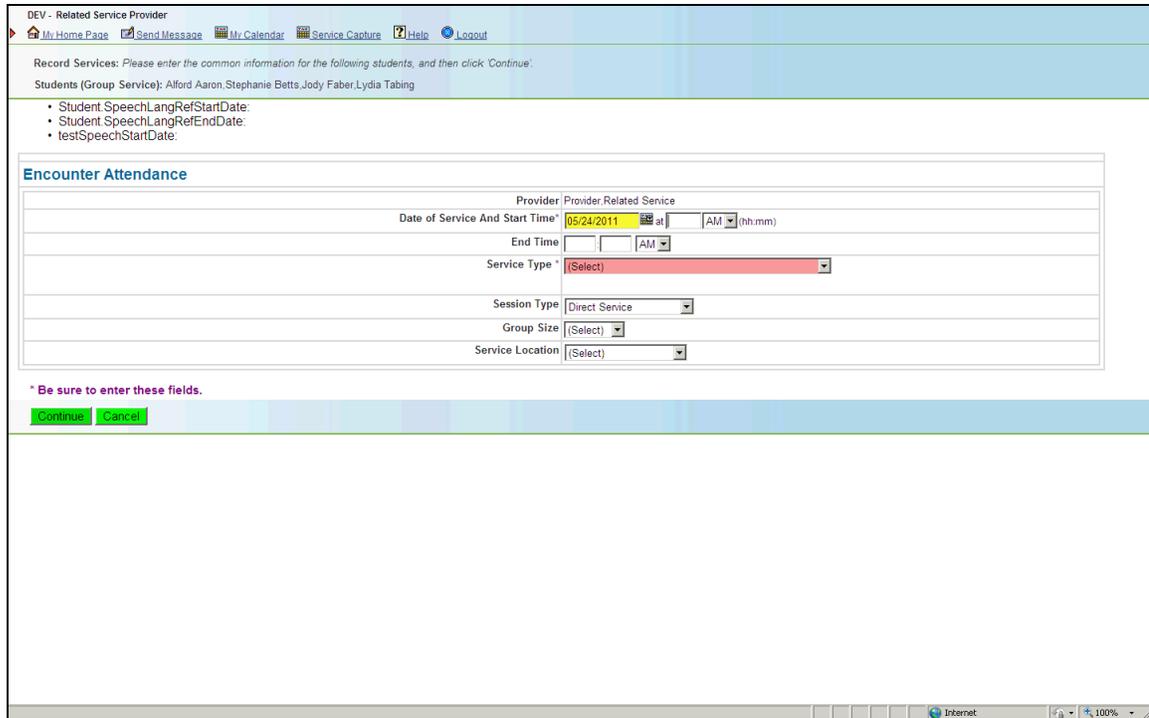
ID	Last Name	First Name	Birth Date	Grade	Gender	School	Disability
310223502	Aaron	Alford	05/04/2006	10th Grade	Male	St Lukes	
31052090	Abbasal	Shazad	03/17/2001	1st Grade	Female	PS 033 Chelsea School	
000800001	Betta	Stephanie	06/23/2000	4th Grade	Female	PS 071 Rose E Scala	
31005460	Faber	Jody	07/29/1996	6th Grade	Male	Jhs 216 George J Ryan	
31020605	Fabris	James	03/17/2001	1st Grade	Female	Foretto H. Laguardia High School	
31028832	Tabassum	Touaif	08/17/1999	3rd Grade	Female	PS 081 Thaddeus Stevens	
31015161	Tabing	Lydia	08/01/1996	6th Grade	Male	Brooklyn Technical High School	

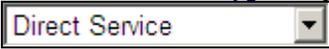
Step	Action
1.	<p>Click the Service Capture link from your homepage to open your service capture calendar.</p> <p>Alternatively, you can click the Select dropdown button from a student's name that is on your caseload.</p> 



Step	Action
2.	Click the name of the student for which you wish to record services. Click to select Aaron, Alford . <u>Aaron,Alford (310223502)</u>
3.	The first student has been selected. To select multiple students, hold down the Ctrl key while clicking on the student's name. You can also use the "select all" link to select all students in the group.
4.	Press the [Ctrl] key and click Betts, Stephanie . <u>Betts,Stephanie (000800001)</u>
5.	Press the [Ctrl] key and click Faber, Jody . <u>Faber,Jody (31005460)</u>
6.	Press the [Ctrl] key and click Tabing, Lydia . <u>Tabing,Lydia (31015181)</u>
7.	Click the Record Past Services link. Record Past Services
8.	Use this calendar to select the dates to record service. You may select multiple dates. Click to select May 24th . <u>24</u>

Step	Action
9.	<p>The selected dates are now highlighted in green. Today's date is highlighted in yellow.</p> <p>Click the OK button.</p> 



Step	Action
10.	<p>Enter the appropriate information into the Time field.</p> <p>Enter "10".</p>
11.	<p>Enter the appropriate information into the End Time field.</p> <p>Enter "11".</p>
12.	<p>Click the dropdown to specify the Service Type.</p> <p>Note that the options on the form will change based on the type of service that is selected from the dropdown list.</p>
13.	<p>Click to select Adapted Physical Education.</p>
14.	<p>Click the Session Type dropdown.</p> 

DEV - Related Service Provider

My Home Page | Send Message | My Calendar | Service Capture | Help | Logout

Record Services:
 Select Record: # Records Saved: of

- Student SpeechLangRefStartDate:
- Student SpeechLangRefEndDate:
- testSpeechStartDate:

Encounter Attendance

Student: Betts, Stephanie
 Student ID: 000800001
 Provider: Provider,Related Service
 Date of Service And Start Time*: 05/24/2011 at 10:00 AM (hh:mm)
 End Time: 11 AM
 Service Type*: Adapted Physical Education
 Session Type: Direct Service
 Duration: (Select)
 Group Size: Direct Service - Makeup by a value (Select)
 Service Location: Student Absent
 Progress Indicator: Provider Absent
 Cancelled

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.

Step	Action
15.	Click to select Direct Service .

DEV - Related Service Provider

My Home Page | Send Message | My Calendar | Service Capture | Help | Logout

Record Services: Please enter the common information for the following students, and then click 'Continue'.

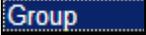
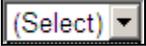
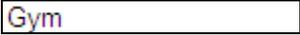
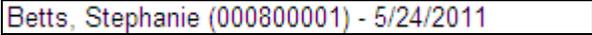
Students (Group Service): Alford, Aaron, Stephanie Betts, Jody Faber, Lydia Tabing

- Student SpeechLangRefStartDate:
- Student SpeechLangRefEndDate:
- testSpeechStartDate:

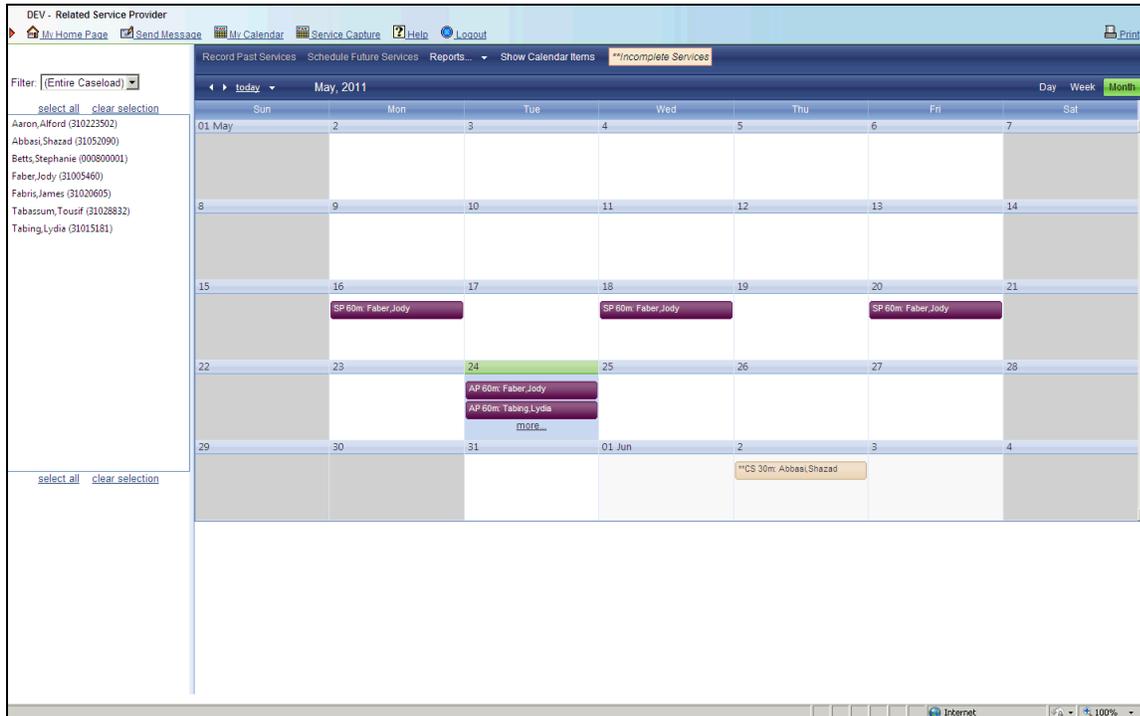
Encounter Attendance

Provider: Provider,Related Service
 Date of Service And Start Time*: 05/24/2011 at 10 AM (hh:mm)
 End Time: 11 AM
 Service Type*: Adapted Physical Education
 Session Type: Direct Service
 Group Size: (Select)
 Service Location: (Select)

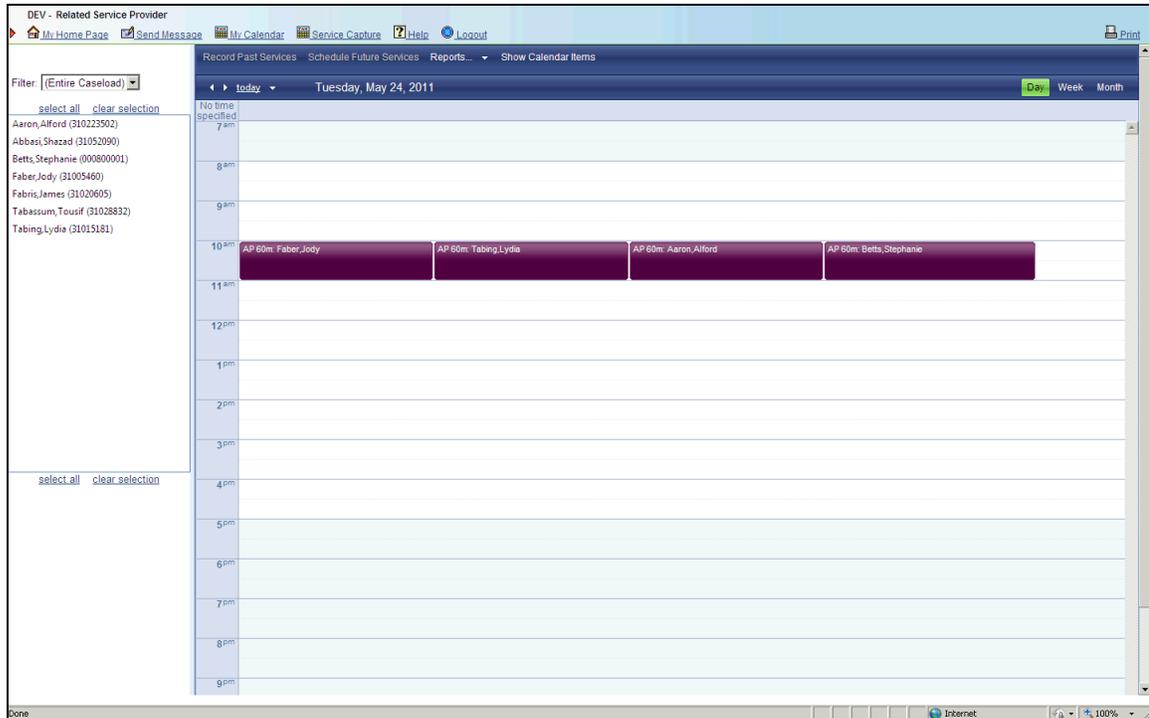
* Be sure to enter these fields.

Step	Action
16.	Click the Group Size dropdown. 
17.	Click to select Group . 
18.	Click the Group Size dropdown. 
19.	Click to select a group size of 3 . 
20.	Click the Service Location dropdown. 
21.	Click to select Gym . 
22.	Click the Continue button. 
23.	Click the Progress Indicator dropdown.
24.	Click to select Student made partial progress toward goal attainment .
25.	Enter the appropriate information into the Session Notes field. Enter " text here ".
26.	Note: Clicking the checkbox to certify the service will submit the service record to the DOE. Be sure that the information is accurate and truthful before proceeding. All services must be completed and certified prior to the 15th of the month following the service.
27.	Click the checkbox to certify this service. 
28.	Click the Save button. 
29.	The service has been saved. Next to the student's name it is indicated as "Saved" and 1 out of 4 records have been saved.
30.	Click the Select Record dropdown to certify another service. Click to select Betts, Stephanie. 
31.	You are now viewing the service details for the second student. Repeat the previous steps to complete the Progress Indicator, Session Notes, and Certifying a Service.

Step	Action
32.	Click the Service Capture calendar to view these records on the calendar.  Service Capture



Step	Action
33.	The services now appear on the Service Capture calendar. Click the more... link to view all of the records for May 24th. 



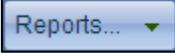
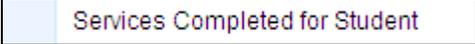
Step	Action
34.	Click to view the service details. 
35.	You are now viewing the service record details. Use the links on the top navigation toolbar to return to the Service Capture calendar or elsewhere in SESIS.
36.	This concludes the lesson on recording/scheduling group services. End of Procedure.

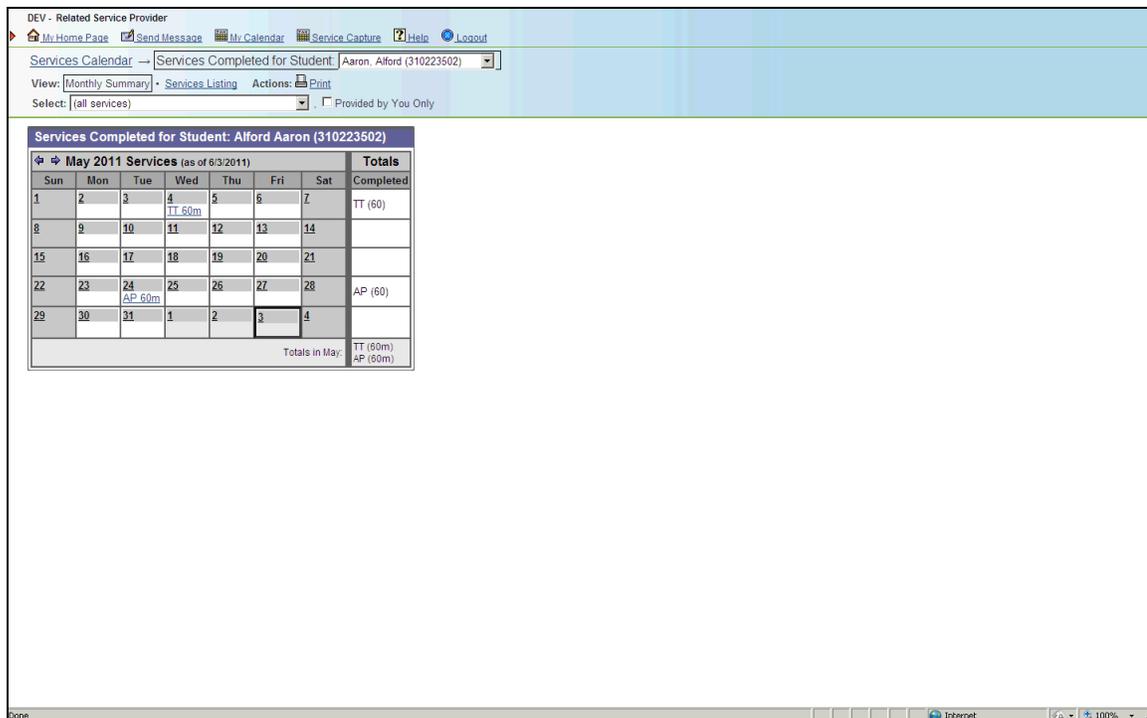
Reviewing Encounter Attendance Reports

Procedure

This lesson will guide you through the process of reviewing encounter attendance reports.

Step	Action
1.	Click the Service Capture link from your homepage. 

Step	Action
2.	Click the Reports link. 
3.	There are two types of Encounter Attendance reports that you can view directly from the Service Capture calendar.
4.	Click to view the Services Completed for Student report. 
5.	This report shows a monthly summary of all the recorded services for a particular student.



DEV - Related Service Provider

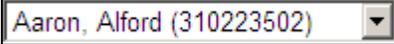
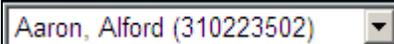
My Home Page | Send Message | My Calendar | Service Capture | Help | Logout

Services Calendar → Services Completed for Student: Aaron, Alford (310223502)

View: Monthly Summary | Services Listing | Actions: Print

Select: (all services) | Provided by You Only

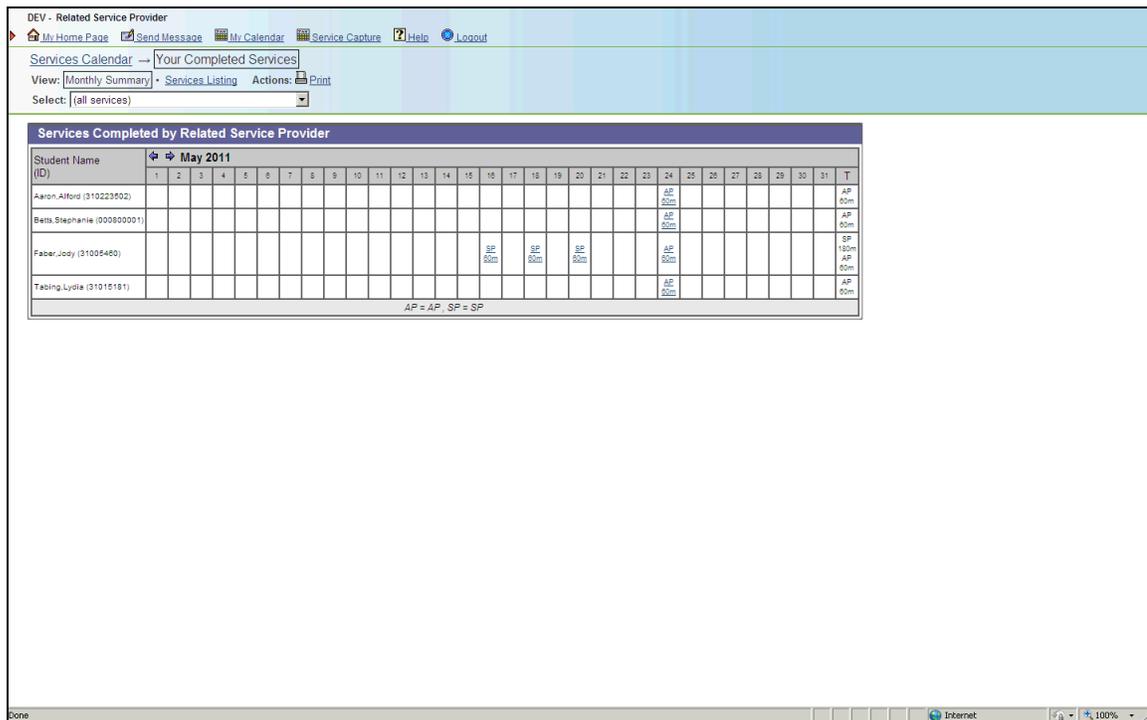
Services Completed for Student: Alford Aaron (310223502)							
May 2011 Services (as of 6/3/2011)							Totals
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Completed
1	2	3	4 TT 60m	5	6	7	TT (60)
8	9	10	11	12	13	14	
15	16	17	18	19	20	21	
22	23	24 AP 60m	25	26	27	28	AP (60)
29	30	31	1	2	3	4	
Totals in May:							TT (60m) AP (60m)

Step	Action
6.	Click the Services Completed for Student: list. 
7.	Click this dropdown to view the monthly summary of other students. 
8.	Click this dropdown to select specific service types. 

Step	Action
9.	Clicking on a recorded service from the monthly summary will show more details of this service. Click the TT 60m link.
10.	This is the Services Listing view of the report, which provides more detail on the selected service.
11.	We still have to option to view another student or another service type. Click to return to the Monthly Summary view of the report.
12.	Checking the "Provided by You Only" option will show service records for only the services that were provided by you. Services from other providers will not appear on your report. Click the Provided by You Only option.
13.	Click to return to the Services Calendar .

The screenshot displays a web-based calendar interface for a service provider. The page title is "DEV - Related Service Provider". The browser address bar shows the URL: https://jeesidev.apps.glp.com/servicecalendar.aspx?pb=2&profile=97086&staff=0&origin=_&year=2011&month=5#. The interface includes a navigation bar with options like "Record Past Services", "Schedule Future Services", "Reports", "Show Calendar Items", and "Incomplete Services". A filter dropdown is set to "(Entire Caseload)". A list of providers is shown on the left, including Aaron, Alferd (310223502), Abbasi, Shezad (31052090), Betts, Stephanie (000800001), Faber, Jody (31005460), Fabric, James (31020605), Tabassum, Touf (31028832), and Tabing, Lydia (31015181). The calendar view shows dates from May 1st to June 4th. Service events are displayed as colored boxes: "SP 60m: Faber, Jody" on May 16, 18, and 20; "AP 60m: Faber, Jody" and "AP 60m: Tabing, Lydia" on May 24; and "CS 30m: Abbasi, Shezad" on June 2. The interface also includes "select all" and "clear selection" buttons for the provider list.

Step	Action
14.	Click the Reports link. 
15.	Click to view the My Completed Services calendar. 
16.	This report shows a monthly summary of all services you have provided and recorded.



DEV - Related Service Provider

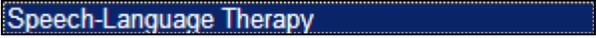
Services Calendar → Your Completed Services

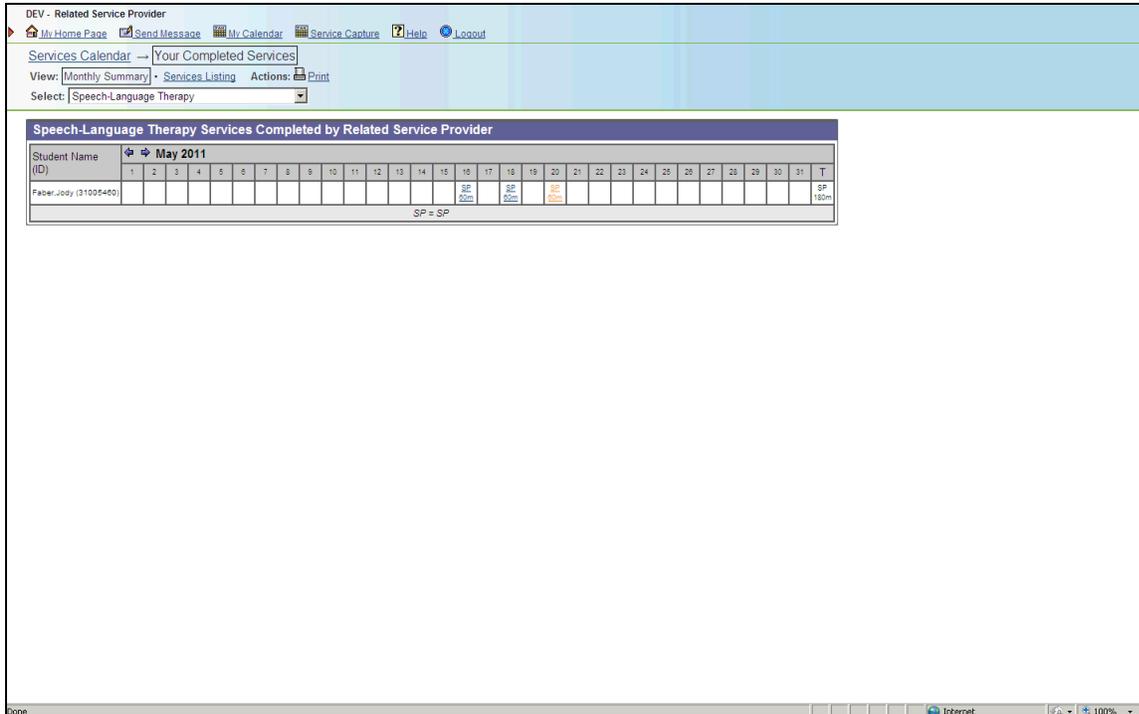
View: Monthly Summary - Services Listing Actions: Print

Select: (all services)

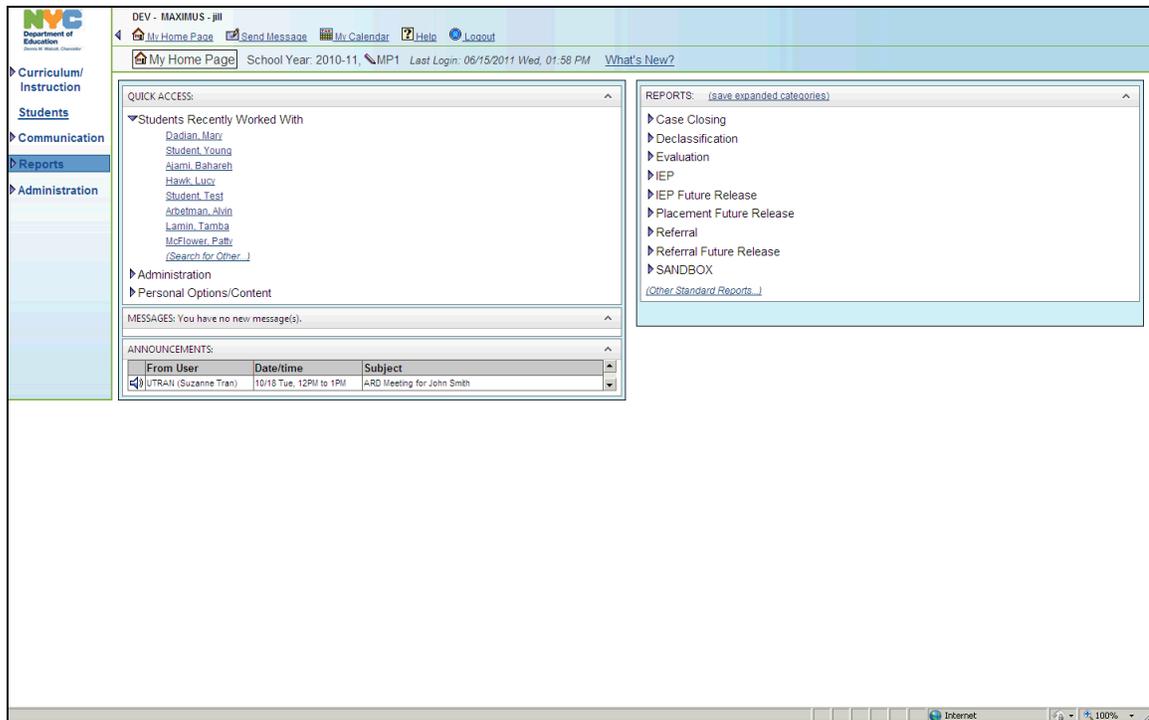
Student Name (ID)	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	T
Aarón Alford (310223502)																								AP 50m							AP 50m	
Betts Stephanie (000800001)																								AP 50m							AP 50m	
Faber Jody (31005460)																	AP 50m		AP 50m		AP 50m			AP 50m							SP 120m AP 50m	
Tabling Lydia (31015181)																								AP 50m							AP 50m	

AP = AP, SP = SP

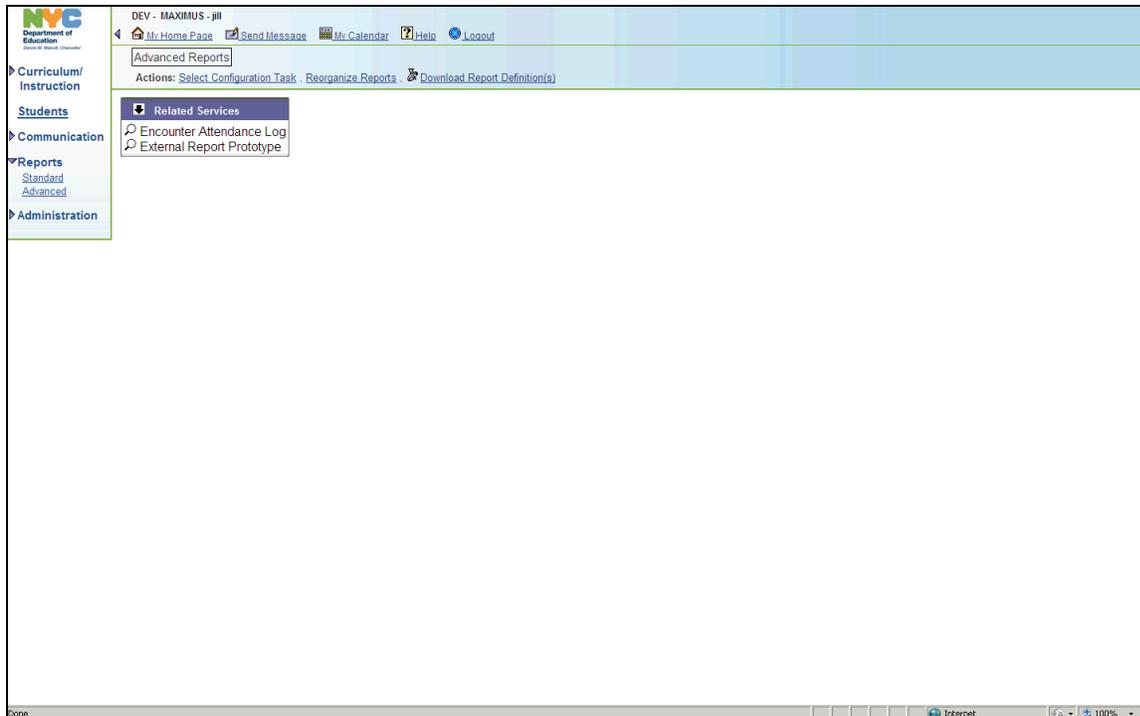
Step	Action
17.	Click the Select dropdown. 
18.	You can select a specific type of service to filter the report and only view that service. Click to select Speech-Language Therapy . 



Step	Action
19.	<p>You are currently viewing all services you provided and recorded for Speech-Language Therapy.</p> <p>Click the SP 60m link to view service details.</p>
20.	<p>This is the Services Listing view of the report, which provides more detail on the selected service.</p>
21.	<p>We still have to option to view another student or another service type.</p> <p>Click to return to the Monthly Summary view of the report.</p> <p>Services Calendar</p>
22.	<p>You are now viewing the monthly summary.</p> <p>For the remainder of this lesson we will be logged in as a Central user, as the following reports are only for select Central-based users.</p>



Step	Action
23.	<p>We are now logged in as a Central user.</p> <p>Click the Report menu.</p> 
24.	<p>Click the Advanced link under the Report menu.</p> 



Step	Action
25.	Click to open the Encounter Attendance Log report. 
26.	This concludes the lesson on reviewing encounter attendance reports. End of Procedure.