

SEGIS Encounter Attendance for OT/PT Providers

Today's Agenda

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

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/SEIS>

From any other computer, use your Outlook password and login to:
<https://portal.nycenet.edu/SpecialPopulations/SEIS/default.htm>

For non-DOE staff:

http://schools.nyc.gov/Academics/SpecialEducation/ContactsResources/SEIS_NonDOE

Logging into SESIS

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

The screenshot shows the login interface for the Special Education Student Information System (SEIS). At the top left is the NYC Department of Education logo. The title 'Special Education Student Information System (SEIS)' is displayed in large blue text. Below the title, a blue banner provides a contact number: 'For help with login issues, please call 718-935-5100'. The main content area is divided into two columns. The left column contains a welcome message and a disclaimer. The right column contains instructions on how to access the system, including a note that access is available to all DOE schools and a warning not to change the pre-populated 'School/District ID' field. Below these instructions is a login form with three input fields: 'School/District ID' (pre-filled with 'NYCONFIG'), 'User ID', and 'Password'. A blue arrow points to the 'User ID' field, and another blue arrow points to the 'Password' field. A 'Sign In' button is located to the right of the form. At the bottom of the right column, there is a link to reset the password and a link for more information about SESIS.

NYC
Department of
Education

**Special Education Student
Information System (SEIS)**

For help with login issues, please call 718-935-5100

Welcome to the Special Education Student Information System (SEIS). SEIS supports users in completing special education workflow processes from referral through IEP development. Please visit the DOE's intranet site (link located below the login) to access training materials and to learn more about preparing for SEIS in your school.

Access to SEIS is currently available to all DOE schools

Please do not change the pre-populated "School/District ID" field.

To access SEIS, use your DOE User ID and password.
Enter your User ID as follows;
CENTRALuser ID

This computer system, including all related equipment and information or data contained herein, is the exclusive and proprietary property of the NYC Department of Education (NYCDoE) and is solely for uses expressly authorized by NYCDoE. You have no right to privacy on the system, and all information and activity on the system may be monitored at any time for any reason without any notice. Any unauthorized use of (or allowing any third party, intentionally or negligently to access) the system may result in disciplinary action, civil or criminal penalties.

The Information contained in this system includes confidential data subject to protection by federal, state and New York City laws statutes and regulations. You are prohibited from divulging to any third party or from assisting any third party to access any information obtained through your use hereof.

School/District ID

User ID

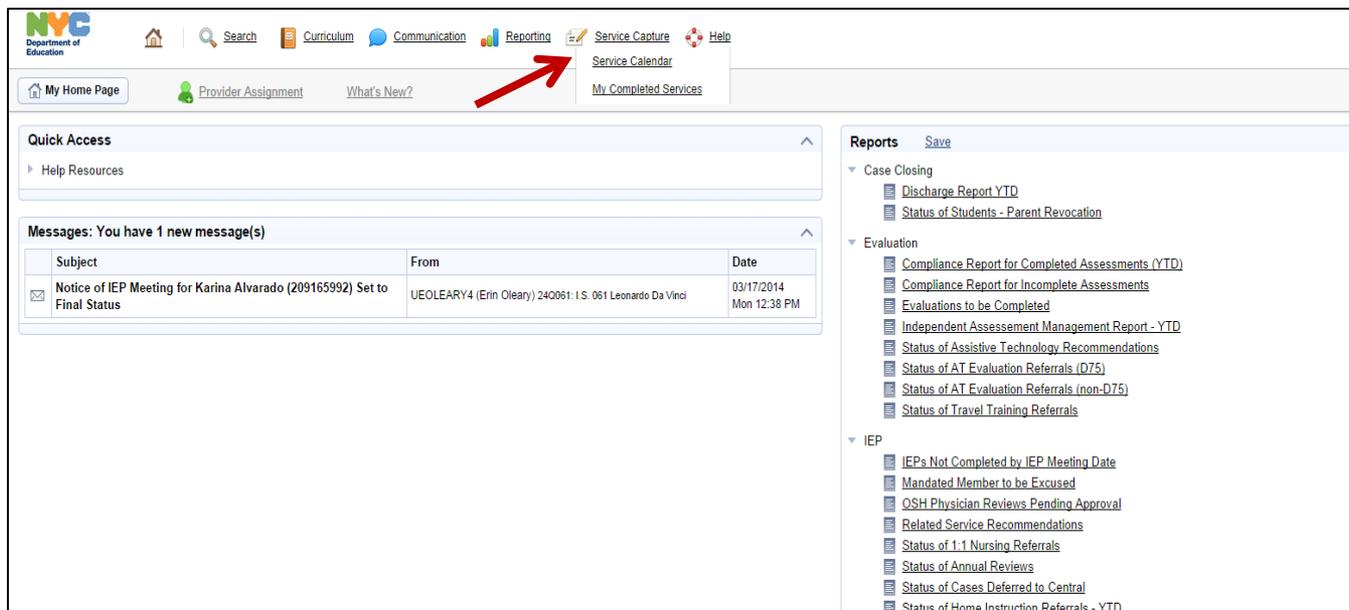
Password

Sign In

To reset your password [click here](#)
For more information about SEIS please go

SE SIS 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.

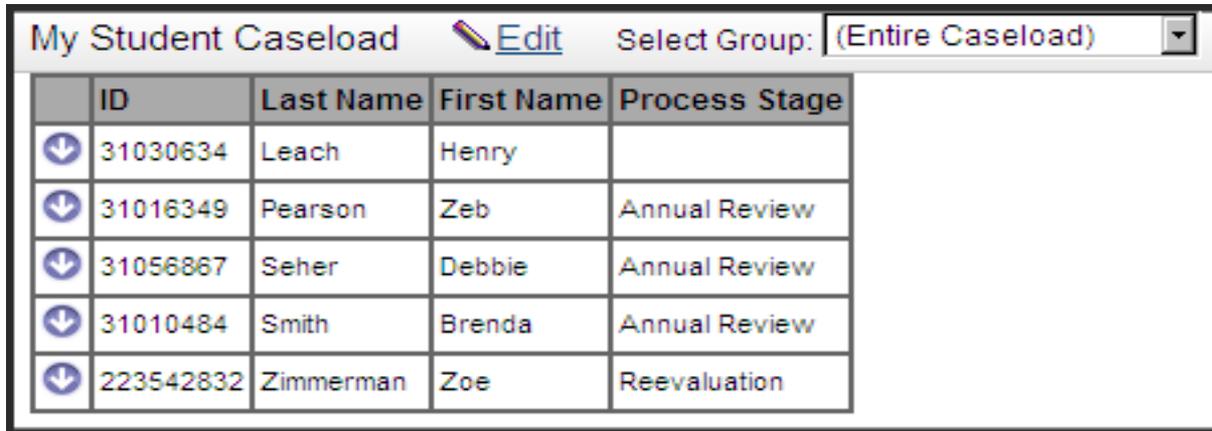


The screenshot displays the SE SIS homepage interface. At the top, there is a navigation bar with the NYC Department of Education logo and several menu items: Home, Search, Curriculum, Communication, Reporting, Service Capture, and Help. Below this is a secondary navigation bar with links for My Home Page, Provider Assignment, What's New?, and My Completed Services. A red arrow points to the 'Service Capture' dropdown menu, which contains 'Service Capture' and 'Service Calendar' options. The main content area is divided into three sections: 'Quick Access' with a 'Help Resources' link; 'Messages: You have 1 new message(s)' with a table listing a message about an IEP meeting for Karina Alvarado; and 'Reports' with a 'Save' button and a list of report categories including Case Closing, Evaluation, and IEP, each with several sub-links.

Subject	From	Date
Notice of IEP Meeting for Karina Alvarado (209165992) Set to Final Status	UEOLEARY4 (Erin O'leary) 240061.1.S. 061 Leonardo Da Vinci	03/17/2014 Mon 12:38 PM

Overview of Caseload Management

- The Student Caseload is located at the bottom of the SESIS Home Page.
- DOE staff can edit (add or remove) students from their caseloads.
- SESIS roles with city-wide access can also add students to the caseloads of staff members.



The screenshot shows a web interface titled "My Student Caseload". It includes an "Edit" button with a pencil icon and a "Select Group" dropdown menu currently set to "(Entire Caseload)". Below this is a table with the following data:

	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 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.

The screenshot displays the NYC Department of Education homepage. At the top left is the NYC Department of Education logo. The navigation bar includes icons for Home, Search, Curriculum, Communication, Reporting, Service Capture, and Help. The 'Service Capture' menu is open, showing 'Service Calendar' and 'My Completed Services'. Below the navigation bar are links for 'My Home Page', 'Provider Assignment', and 'What's New?'. The main content area is divided into three sections: 'Quick Access' with a 'Help Resources' link; 'Messages: You have 1 new message(s)' with a table of messages; and 'Reports' with a 'Save' button and a list of report categories.

	Subject	From	Date
✉	Notice of IEP Meeting for Karina Alvarado (209165992) Set to Final Status		03/17/2014 Mon 12:38 PM

Reports Save

- Case Closing
 - Discharge Report YTD
 - Status of Students - Parent Revocation
- Evaluation
 - Compliance Report for Completed Assessments (YTD)
 - Compliance Report for Incomplete Assessments
 - Evaluations to be Completed
 - Independent Assessment Management Report - YTD
 - Status of Assistive Technology Recommendations
 - Status of AT Evaluation Referrals (D75)
 - Status of AT Evaluation Referrals (non-D75)
 - Status of Travel Training Referrals
- IEP
 - IEPs Not Completed by IEP Meeting Date
 - Mandated Member to be Excused
 - OSH Physician Reviews Pending Approval
 - Related Service Recommendations
 - Status of 1:1 Nursing Referrals
 - Status of Annual Reviews
 - Status of Cases Deferred to Central
 - Status of Home Instruction Referrals - YTD

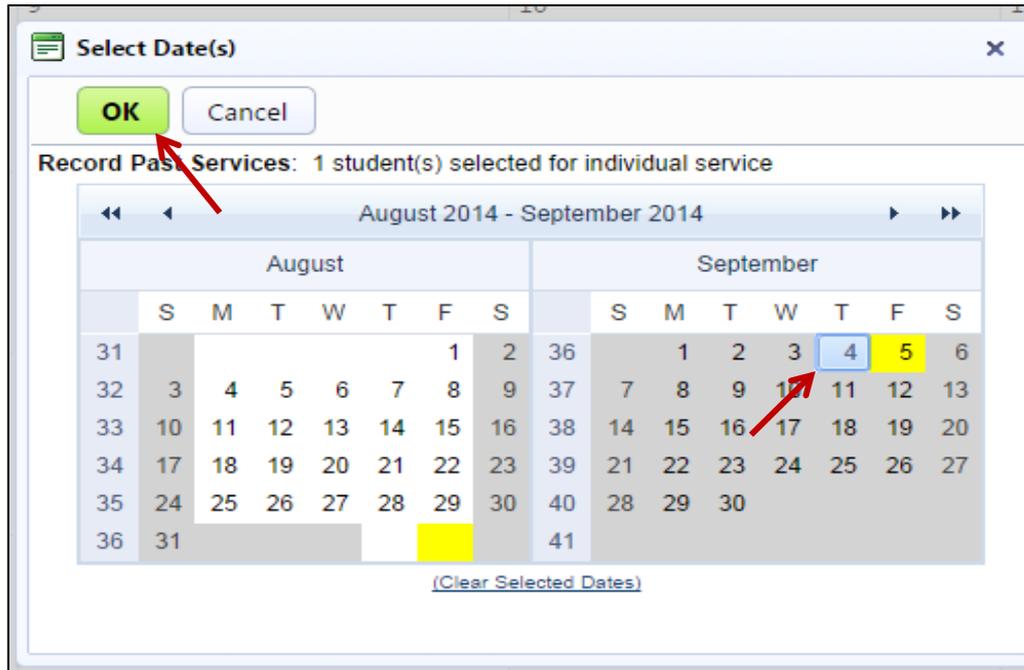
Recording a Past Service for One Student (Step One)

- Shaded out days are Non-DOE school days.
- Once in the **Service Calendar**, click on a student in your Caseload.
- Then click on *Record Past Services*.

The screenshot displays the 'Record Past Services' interface for September 2014. The calendar grid shows days from 31st to 4th. Days 1, 2, 25, 26, and 27 are shaded grey, indicating they are Non-DOE school days. A red arrow points to the 'Record Past Services' button at the top. Another red arrow points to the 'Caseload' filter dropdown on the left. A third red arrow points to the shaded area of the calendar grid. The interface also includes a 'Filter:' dropdown, 'select all' and 'clear selection' links, and a 'Print' button.

Recording a Past Service for One Student (Step Two)

- Click the date you want to record the past service.
- Click **OK** to display the **Service Record** input form.



The screenshot shows a 'Select Date(s)' dialog box with the following components:

- Buttons: **OK** (highlighted in green) and **Cancel**.
- Text: **Record Past Services: 1 student(s) selected for individual service**
- Calendar: A calendar view for August 2014 and September 2014. The date August 4th is selected (highlighted in blue). The date August 5th is highlighted in yellow. A red arrow points to the 'OK' button, and another red arrow points to the date August 4th.
- Text: **August 2014 - September 2014**
- Text: **August** and **September**
- Text: **S M T W T F S** (days of the week)
- Text: **31 32 33 34 35 36** (August dates)
- Text: **36 37 38 39 40 41** (September dates)
- Text: **(Clear Selected Dates)**

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.

The screenshot shows the 'Record Services' interface for 'Encounter Attendance'. The form includes the following fields and options:

- Student:** Gi
- Student ID:**
- Provider:**
- Date of Service and Start Time:** 09/05/2014 (with calendar icon), 9:00 AM (with time dropdown)
- End Time:** 9:30 AM (with time dropdown)
- Service Type:** (Select) [dropdown menu]
- Language of Service:** English [dropdown menu]
- Session Type:** Service Provided [dropdown menu]
- Duration:** 30 minutes
- Group Size:** Group [dropdown menu] *Please specify a value: 2 [input field]
- Service Location:** Therapy Room [dropdown menu]
- Progress Indicator:** Student made expected progress toward goal attainment. [dropdown menu]
- Session Notes:** Enter your session notes here. [text area]

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 as documented in this record, and to the truth of the information it contains.

* Be sure to enter these key fields.

Save Cancel

Recording a Past Service for One Student (Step Four)

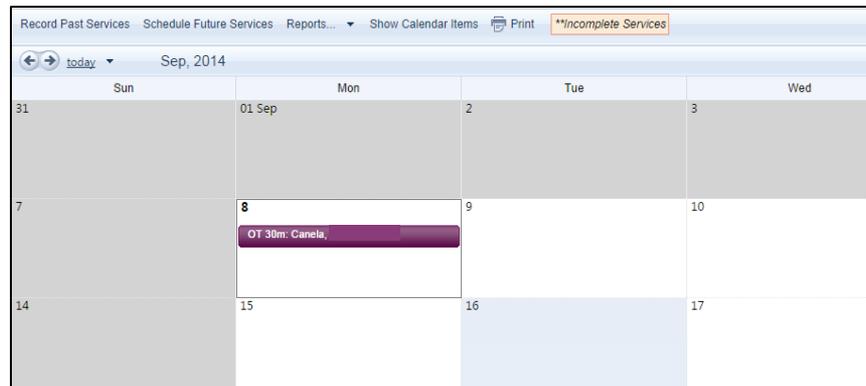
- To complete recording the service, you must indicate progress, add session notes and “certify” the service. If you have further questions regarding session notes, please reach out to your supervisor.
- Click **Save** when finished.

The screenshot shows a web-based form for recording a service. At the top, there are fields for 'Date of Service and Start Time' (09/05/2014, 9:00 AM), 'End Time' (9:30 AM), 'Service Type' (Occupational Therapy), 'Language of Service' (English), 'Session Type' (Service Provided), 'Duration' (30 minutes), and 'Group Size' (Group, 2). Below these is a 'Service Location' dropdown (Therapy Room) and a 'Service Description' list with checkboxes. The 'Group therapeutic procedure - CPT Code 97150' is selected. A 'Progress Indicator' dropdown is set to 'Student made expected progress toward goal attainment'. A 'Session Notes' text area is present. At the bottom, there is a 'Certify' checkbox, a 'Save' button, and a 'Cancel' button. Red arrows point to the 'Save' button, the 'Certify' checkbox, the 'Session Notes' field, and the 'Progress Indicator' dropdown.

- 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)

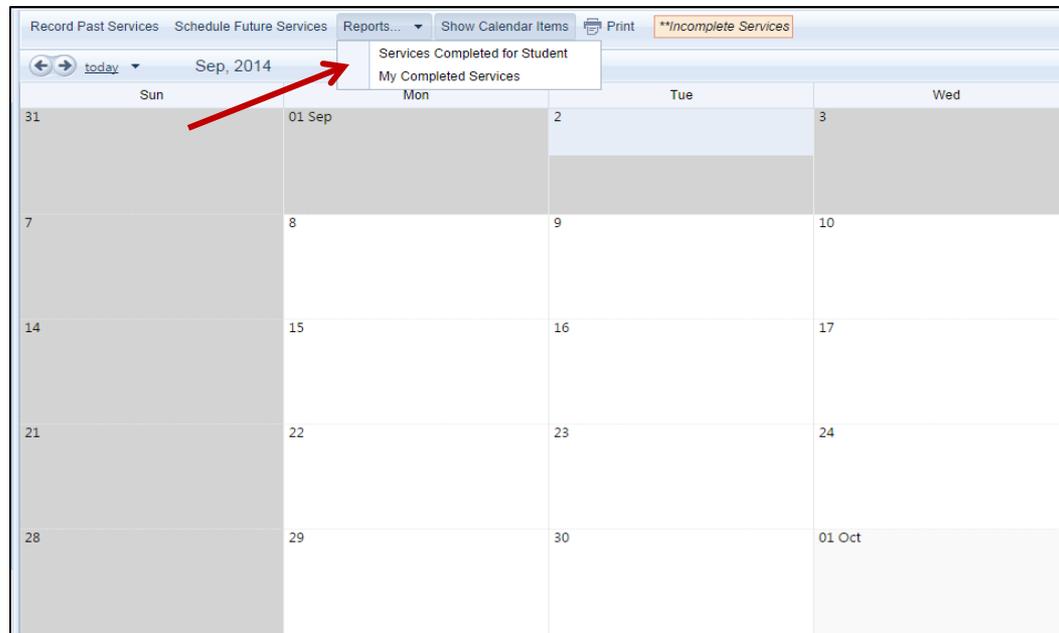
- The completed record will appear highlighted in purple on the **Services Calendar**.



- 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.

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.

Services Calendar Services Completed for Student: [dropdown]

Monthly Summary Services Listing

Service: (all services) [dropdown] Provided by You Only

Month: September, 2014 [calendar icon]

Services Completed for Student: [dropdown] [print icon]

September 2014 Services (as of 9/8/2014)							Totals
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Completed
31	1	2	3	4	5 SP 30m	6	SP (30)
7	8 OT 30m	9	10	11	12	13	OT (30)
14	15	16	17	18	19	20	
21	22	23	24	25	26	27	
28	29	30	1	2	3	4	
Totals in September:							SP (30m) OT (30m)

Student name and NYCID will be here

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.

Services Calendar | Services Completed for Student: [Dropdown]

Monthly Summary | Services Listing

Service: Speech-Language Therapy | Provided by You Only

Month: September, 2014 | Set Specific Date Range...

Speech-Language Therapy Services Completed for Student:

Service	Date/Time	Minutes	Student	Staff	Actual Group Size	AMP	End Date Last Final	End Time HH	End Time MM	Group Size	Is Adaptive Equip	Is Community Work	Is OTCognitive	Is OTFine Motor	Is OTGroup Therapy	Is Other Speech Langth	Is OTOccup The Reev	Is C F
September 2014 Services (as of 9/5/2014)																		
SP	09/05/2014	30			2	Yes				Group	No	No	No	No	No	No	No	N

Encounter Attendance Reports: My Completed Services

- The **My 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.

Services Calendar | **My Completed Services**

Monthly Summary | **Services Listing**

Service: (all services)

Month: September, 2014

Services Completed by

Student Name (ID)	September 2014																														T
	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	
				SP 30m																											SP 30m
			SP 30m																												SP 30m

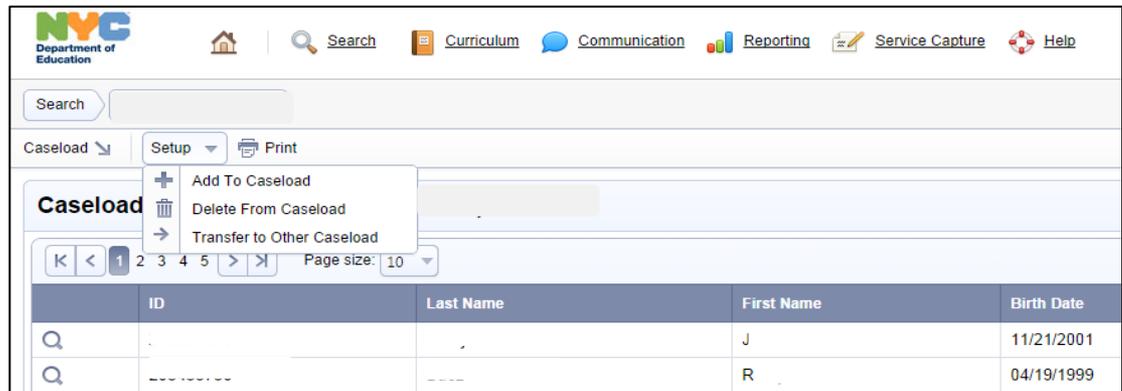
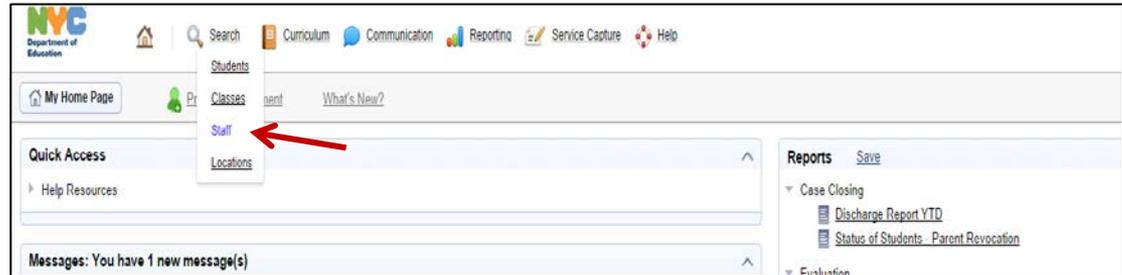
SP = Speech-Language Therapy

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).

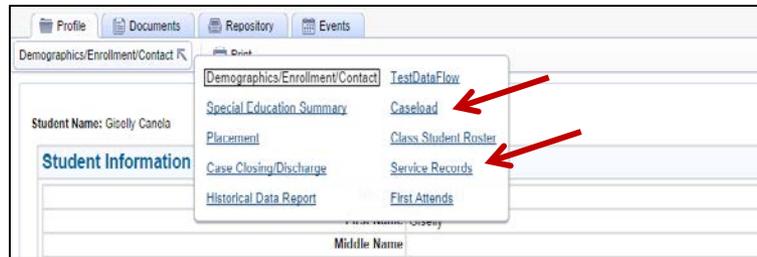
Encounter Attendance for OT/PT Supervisors

- 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.

Service Records for Student:

Student	Staff	Service Date Time	Service	Duration Minutes	Completed
Q		09/09/2014, 09:00 AM	Occupational Therapy	30	Yes
Q		09/09/2014	Speech-Language Therapy	30	Yes
Q		04/23/2014, 02:00 PM	Special Education Teacher Support Services [SETSS]	45	Yes
Q		04/23/2014, 11:50 AM	Speech-Language Therapy	40	Yes
Q		04/11/2014, 11:45 AM	Special Education Teacher Support Services [SETSS]	45	Yes
Q		04/10/2014, 01:15 PM	Special Education Teacher Support Services [SETSS]	45	Yes
Q		04/09/2014, 02:00 PM	Special Education Teacher Support Services [SETSS]	45	Yes
Q		04/08/2014, 10:20 AM	Speech-Language Therapy	40	Yes
Q		04/08/2014, 09:30 AM	Special Education Teacher Support Services [SETSS]	45	Yes
Q		04/07/2014, 10:15 AM	Special Education Teacher Support Services [SETSS]	45	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.