



SEGIS Training Guide

Last Updated: September 4, 2014

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Encounter Attendance

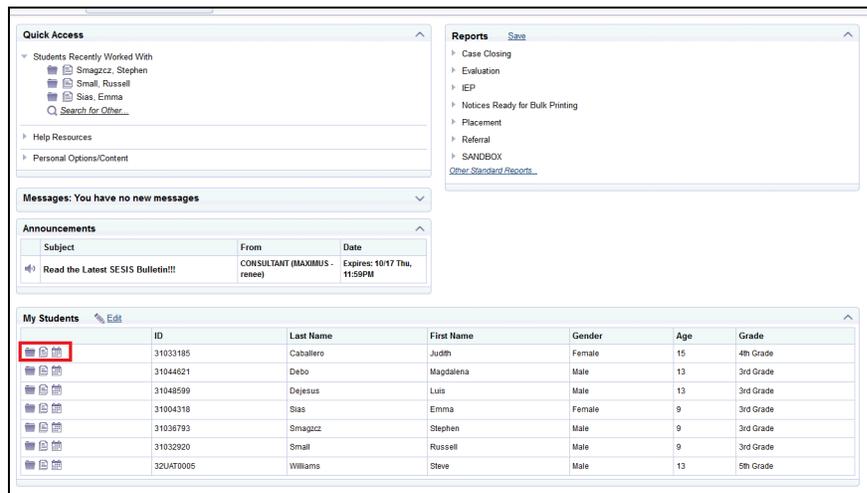
Encounter Attendance

Viewing/Editing Your Caseload

- Caseloads are located on your SESIS homepage.
- Providers who work in multiple schools will have access to students from any school or when access is provided to the student by their supervisor or designated personnel.

Procedure

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



Step	Action
1.	To view a student from your caseload, you have the option to navigate to the student's Profile, Documents, or Service Calendar.

Quick Access

- Students Recently Worked With
 - Smagzcz, Stephen
 - Small, Russell
 - Sias, Emma
 - [Search for Other...](#)
- Help Resources
- Personal Options/Content

Messages: You have no new messages

Announcements

Subject	From	Date
Read the Latest SE SIS Bulletin!!!	CONSULTANT (MAXIMUS - renee)	Expires: 10/17 Thu, 11:59PM

My Students [Edit](#)

ID	Last Name	First Name	Gender	Age	Grade
31033185	Caballero	Judith	Female	15	4th Grade
31044821	Debo	Magdalena	Male	13	3rd Grade
31048599	Dejesus	Luis	Male	13	3rd Grade
31004318	Sias	Emma	Female	9	3rd Grade
31036793	Smagzcz	Stephen	Male	9	3rd Grade
31032920	Small	Russell	Male	9	3rd Grade
32UAT0005	Williams	Steve	Male	13	5th Grade

Step	Action
2.	To add students to your caseload, click the Edit link. Edit

NYC Department of Education

Search Curriculum Communication Reporting Service Capture Help

Margaret Oweaney (PS 071 Rose) Logout

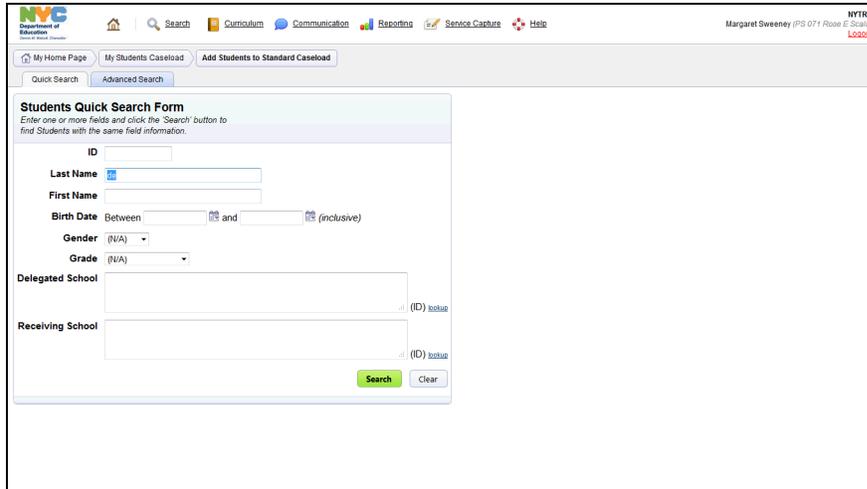
My Home Page My Student Caseload

+ Add Students to Standard Caseload - Remove Students from Standard Caseload + New Caseload Group

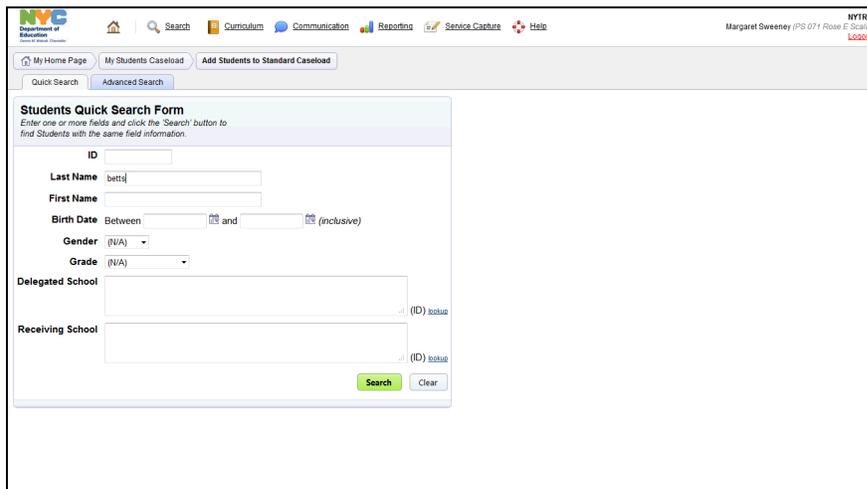
My Student Caseload (7 students)

ID	Last Name	First Name	Gender	Age	Grade
31033185	Caballero	Judith	Female	15	4th Grade
31044821	Debo	Magdalena	Male	13	3rd Grade
31048599	Dejesus	Luis	Male	13	3rd Grade
31004318	Sias	Emma	Female	9	3rd Grade
31036793	Smagzcz	Stephen	Male	9	3rd Grade
31032920	Small	Russell	Male	9	3rd Grade
32UAT0005	Williams	Steve	Male	13	5th Grade

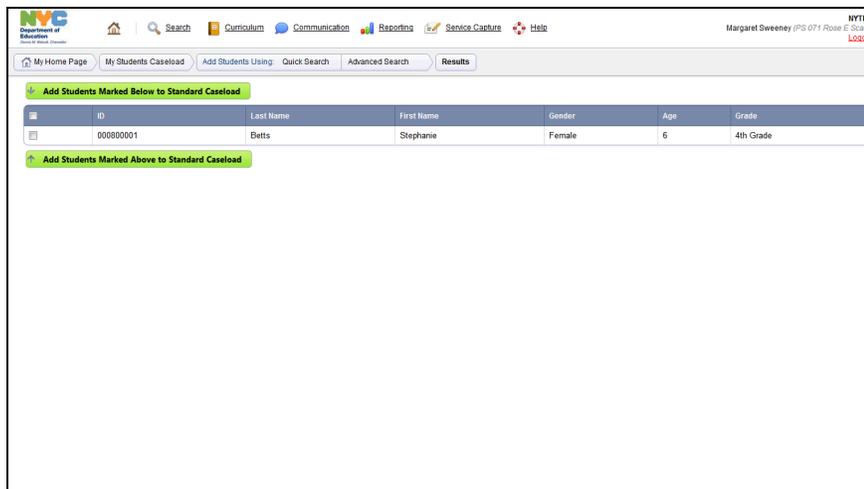
Step	Action
3.	Click the Add Students to Standard Caseload link. Add Students to Standard Caseload



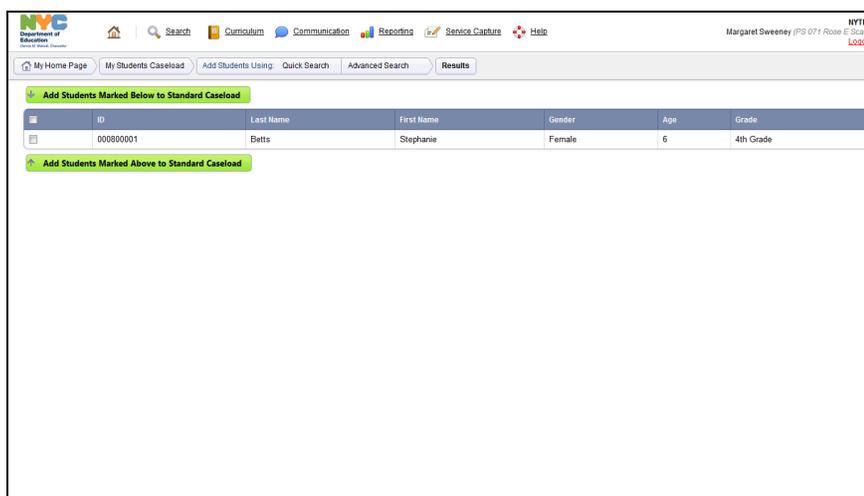
Step	Action
4.	Use the Student Quick Search Form to search for students to add to your caseload. Enter " Betts " in the Last Name field.



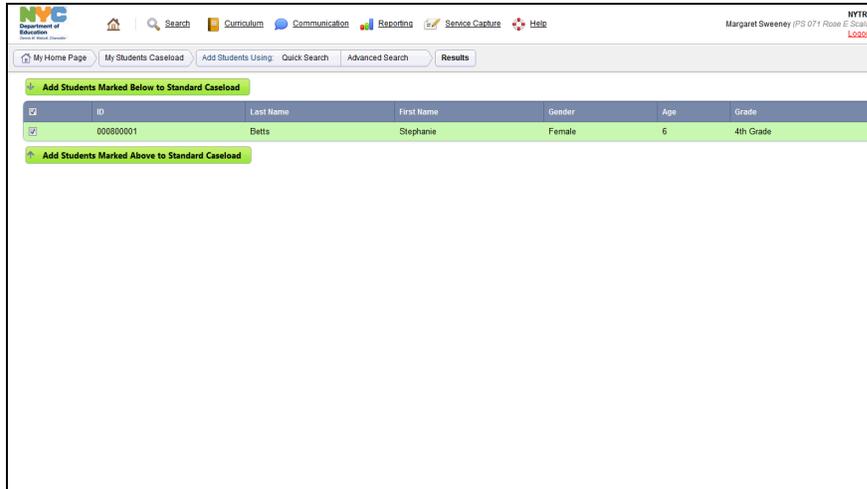
Step	Action
5.	Click the Search button. 



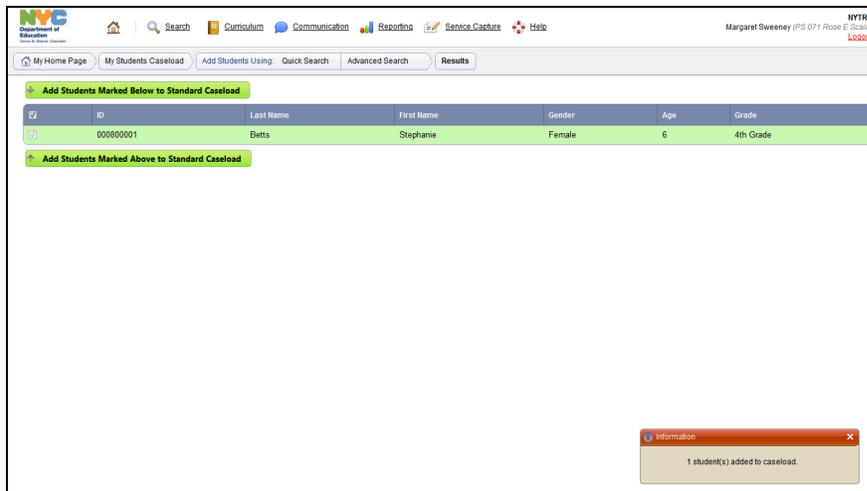
Step	Action
6.	This is a list of all results that match the search criteria. Click the checkbox next to the student you wish to add to your caseload.



Step	Action
7.	Click to select Stephanie Betts . <input type="checkbox"/>



Step	Action
8.	Click the Add Students Marked Above to Standard Caseload button.

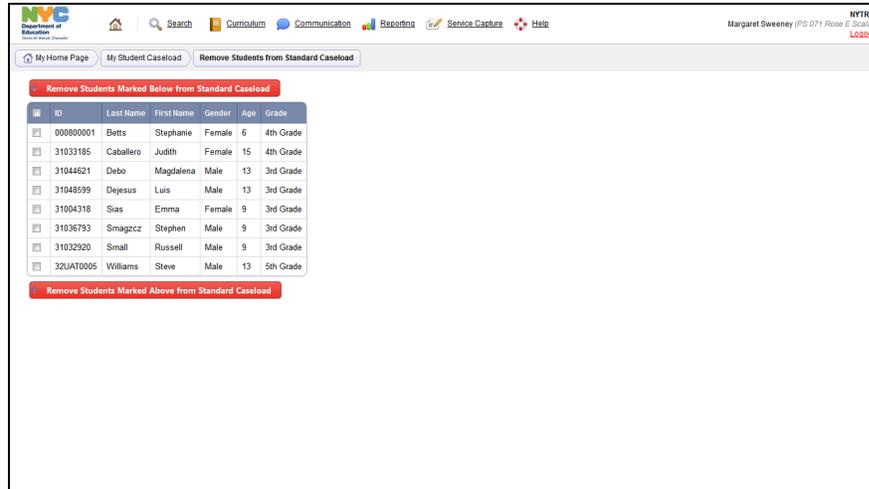


Step	Action
9.	Click the My Students Caseload link. My Students Caseload

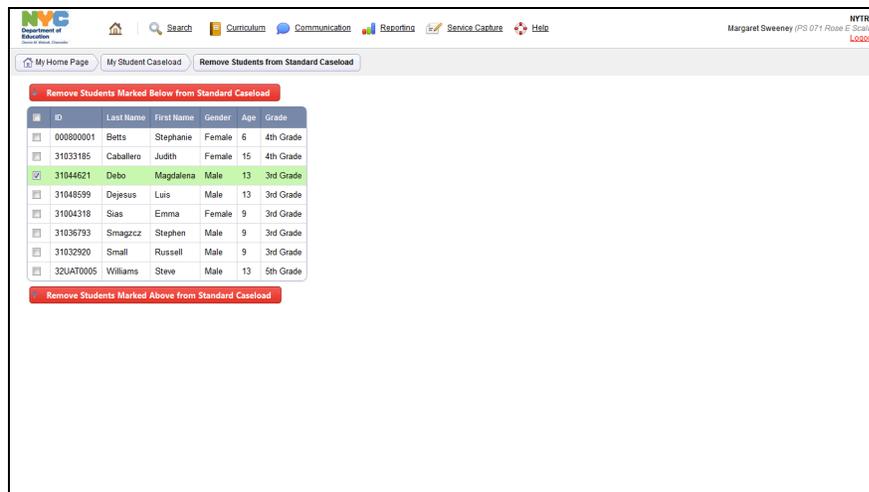
ID	Last Name	First Name	Gender	Age	Grade
00080001	Betts	Stephanie	Female	6	4th Grade
31033185	Caballero	Judith	Female	15	4th Grade
31044621	Debo	Magdalena	Male	13	3rd Grade
31048599	Dejesus	Luis	Male	13	3rd Grade
31004318	Sias	Emma	Female	9	3rd Grade
31036793	Smagzcz	Stephen	Male	9	3rd Grade
31032920	Small	Russell	Male	9	3rd Grade
32UAT0005	Williams	Steve	Male	13	5th Grade

Step	Action
10.	The student we added, Stephanie Betts, is now on our caseload.

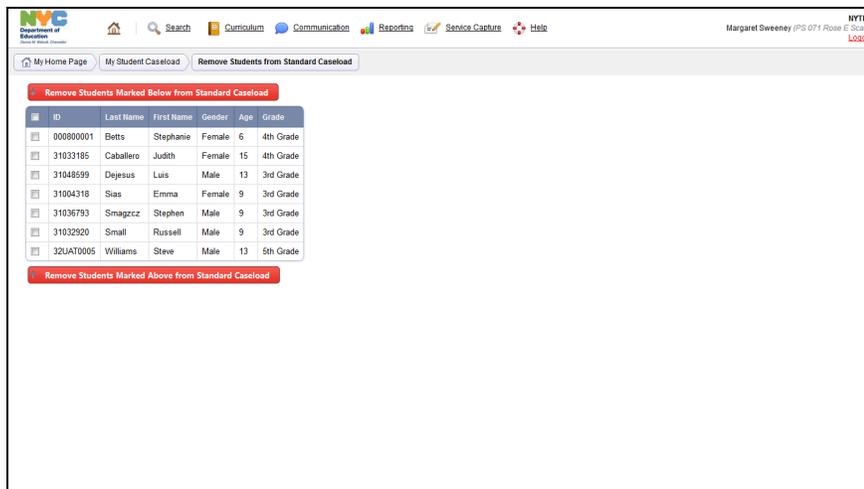
Step	Action
11.	To remove a student from your caseload, click the Remove Students link. Remove Students from Standard Caseload



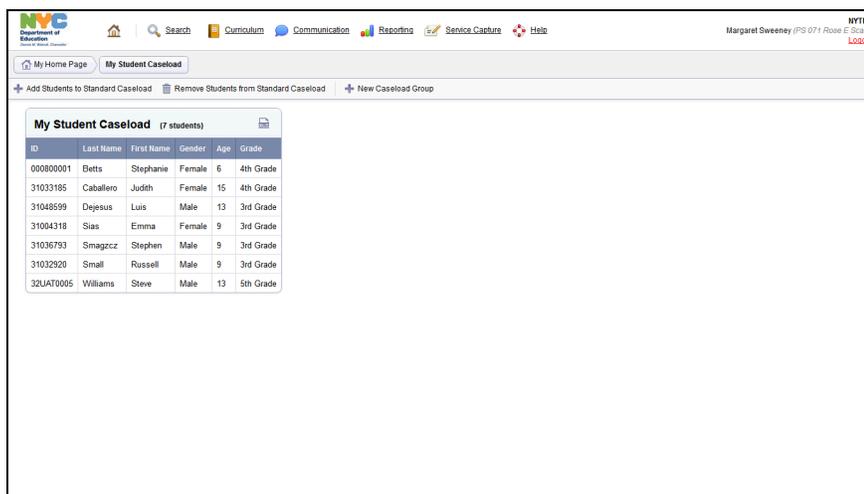
Step	Action
12.	<p>Click the checkbox next to the name of the student you wish to remove from your caseload.</p> <p>Click to select Magdalena Debo.</p> <input type="checkbox"/>



Step	Action
13.	Click the Remove Students Marked Below from Standard Caseload button.



Step	Action
14.	<p>The student is no longer on your caseload list.</p> <p>Click the My Student Caseload link.</p> <p>My Student Caseload</p>



Step	Action
15.	<p>To organize your caseload students into groups, click the New Caseload Group link.</p> <p>+ New Caseload Group</p>

New Caseload Group

Group Name:

Select the students to be in this caseload group:

ID	Last Name	First Name	Gender	Age	Grade
<input type="checkbox"/> 00080001	Betts	Stephanie	Female	6	4th Grade
<input type="checkbox"/> 31033185	Caballero	Judith	Female	15	4th Grade
<input type="checkbox"/> 31048599	Dejesus	Luis	Male	13	3rd Grade
<input type="checkbox"/> 31004318	Sias	Emma	Female	9	3rd Grade
<input type="checkbox"/> 31036793	Smagocz	Stephen	Male	9	3rd Grade
<input type="checkbox"/> 31032920	Small	Russell	Male	9	3rd Grade
<input type="checkbox"/> 32UAT0005	Williams	Steve	Male	13	5th Grade

Step	Action
16.	Enter the appropriate information into the Group Name field. Enter " Speech ".

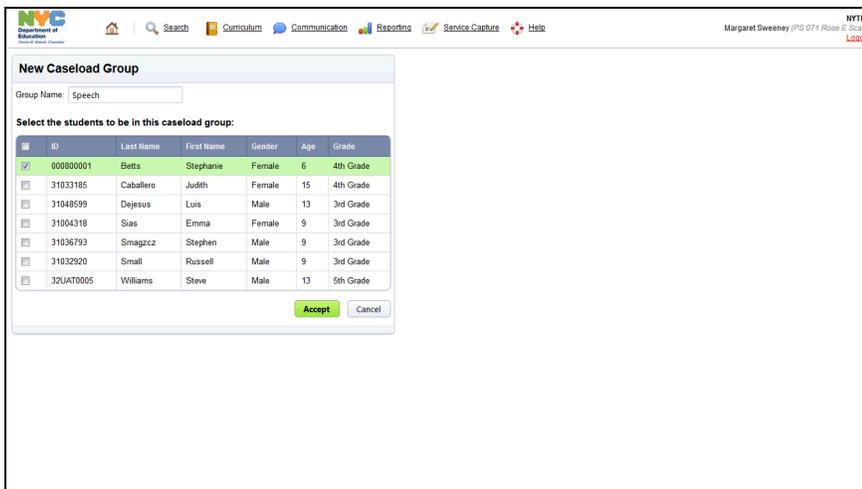
New Caseload Group

Group Name:

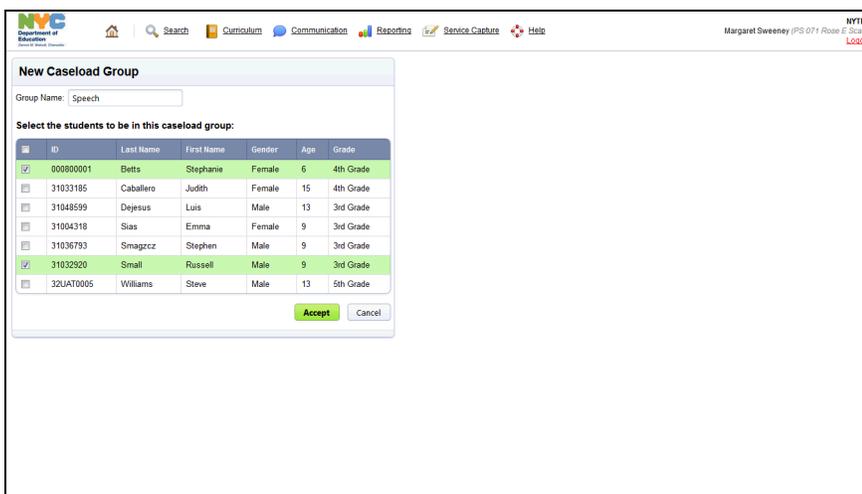
Select the students to be in this caseload group:

ID	Last Name	First Name	Gender	Age	Grade
<input type="checkbox"/> 00080001	Betts	Stephanie	Female	6	4th Grade
<input type="checkbox"/> 31033185	Caballero	Judith	Female	15	4th Grade
<input type="checkbox"/> 31048599	Dejesus	Luis	Male	13	3rd Grade
<input type="checkbox"/> 31004318	Sias	Emma	Female	9	3rd Grade
<input type="checkbox"/> 31036793	Smagocz	Stephen	Male	9	3rd Grade
<input type="checkbox"/> 31032920	Small	Russell	Male	9	3rd Grade
<input type="checkbox"/> 32UAT0005	Williams	Steve	Male	13	5th Grade

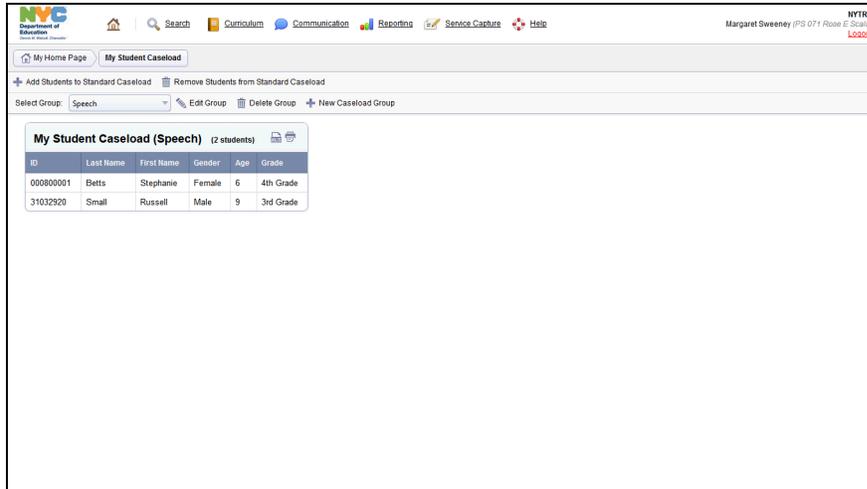
Step	Action
17.	Click to select this student. <input type="checkbox"/>



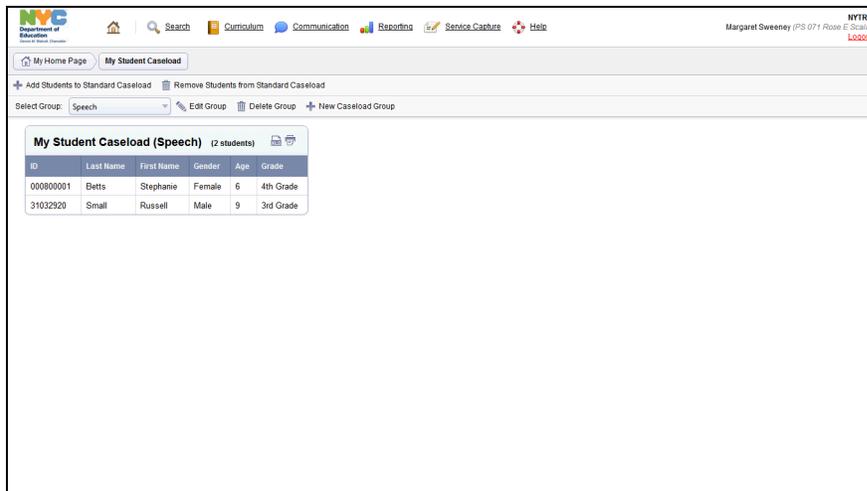
Step	Action
18.	Click to select this student. <input type="checkbox"/>



Step	Action
19.	Click the Accept button. <input type="button" value="Accept"/>

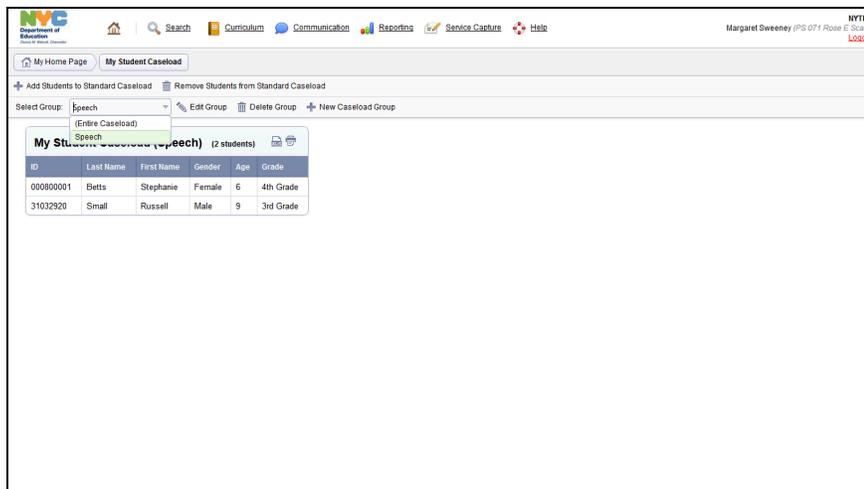


Step	Action
20.	You are now viewing the new caseload group "Speech."

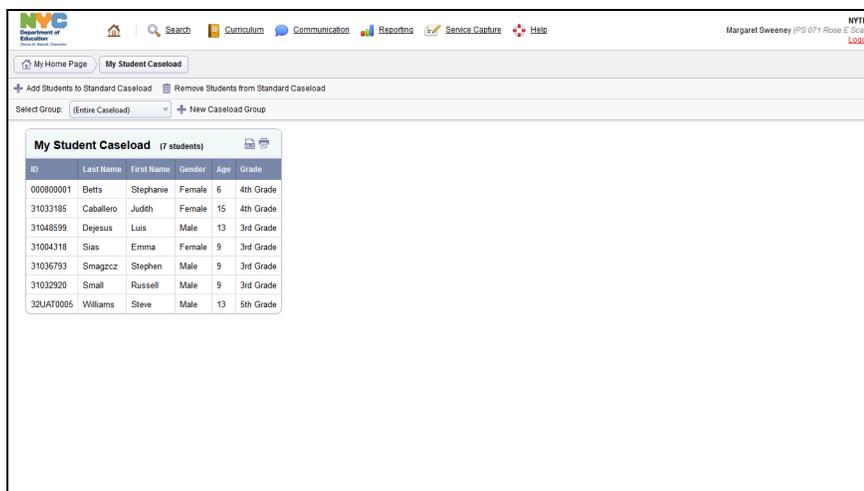


Step	Action
21.	Click the dropdown to see Your Caseload Students list.

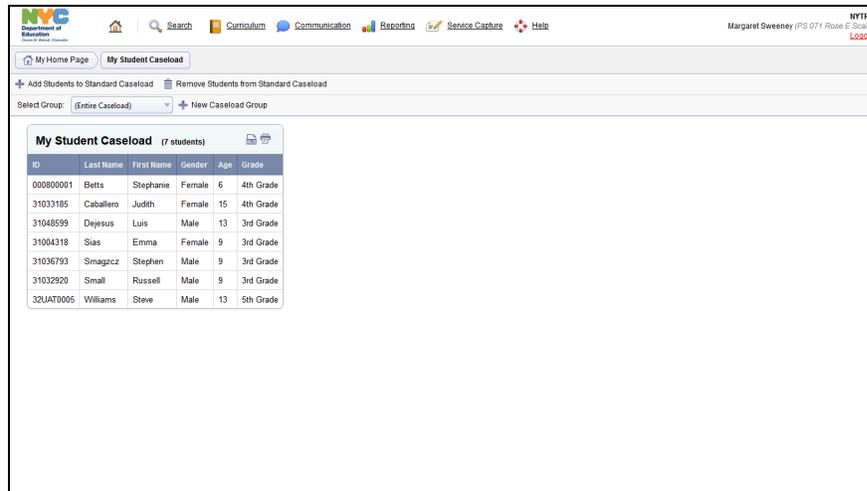




Step	Action
22.	<p>You can view your entire caseload or your separate caseload group by selecting from this dropdown.</p> <p>Click to view the Entire Caseload.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">(Entire Caseload)</div>



Step	Action
23.	<p>You are now viewing your entire caseload, including the students you added to the Speech group.</p>



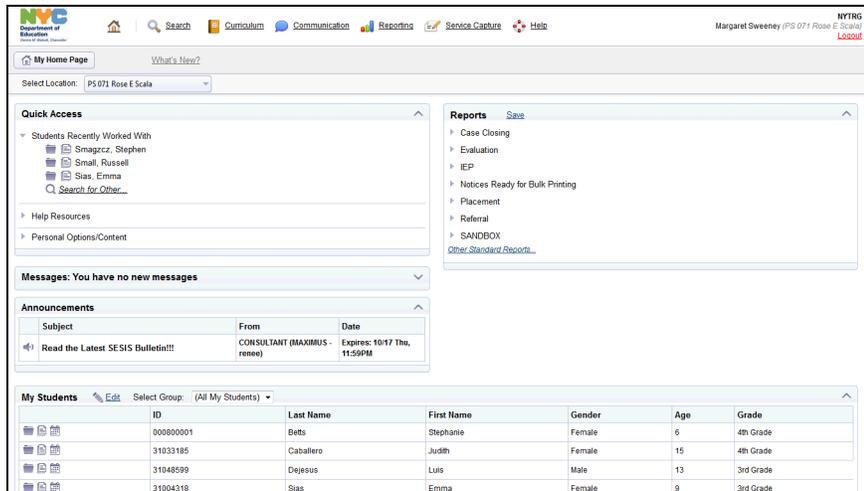
Step	Action
24.	This concludes the lesson on viewing/editing your caseload. End of Procedure.

Scheduling Future Services

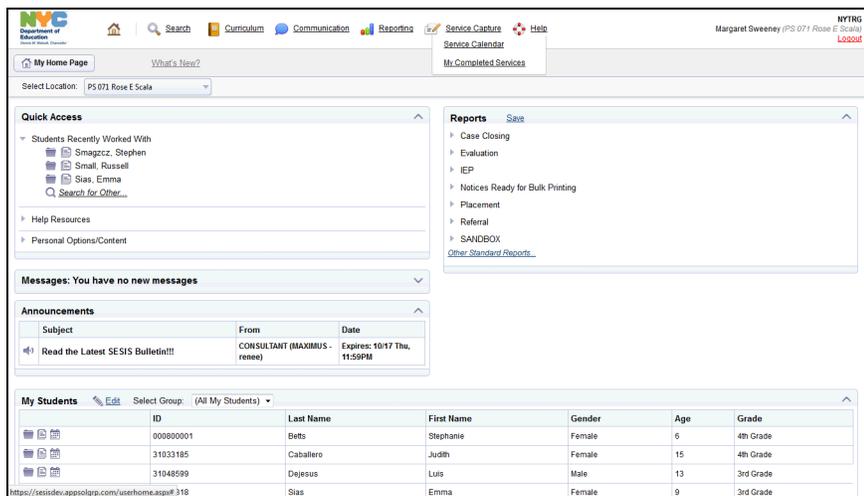
- Scheduling future services is an optional feature of SEGIS and is not required.
- Future sessions can be scheduled in advance for the entire school year but can only be scheduled two months at a time. Sessions can be scheduled for multiple students, including individual sessions as well as group sessions.
- Indicating progress, completing session notes and certifying the session should occur after the service has been completed.

Procedure

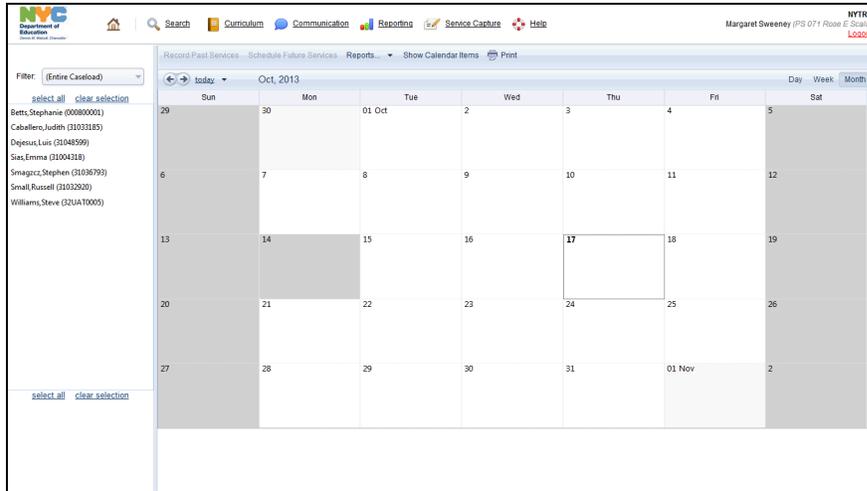
This lesson will guide you through the process of scheduling future services.



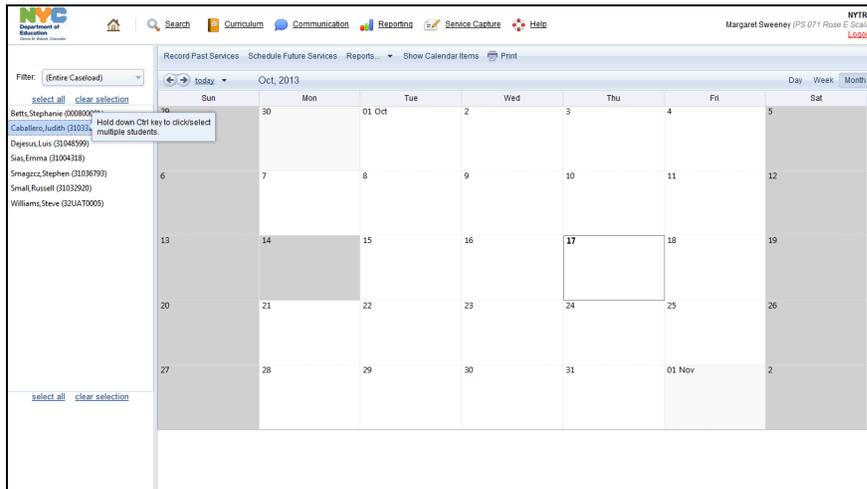
Step	Action
1.	Click the Service Capture link from your homepage. Service Capture



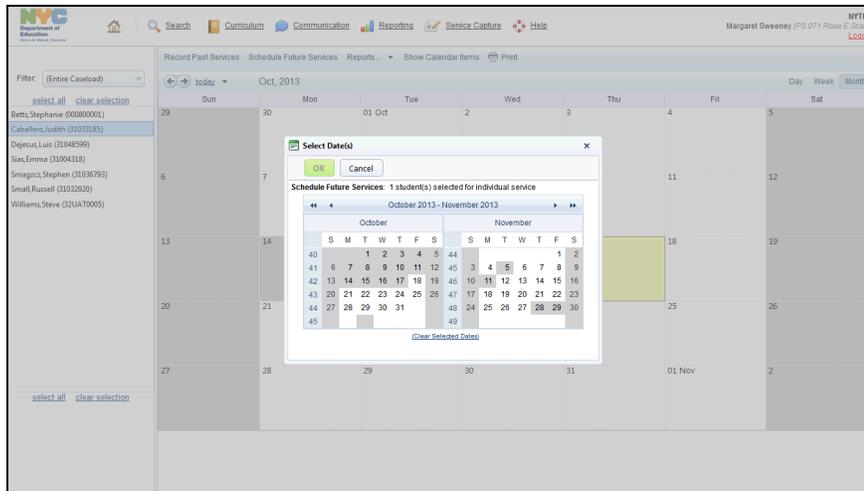
Step	Action
2.	Click the Service Calendar link to open your service capture calendar. Service Calendar



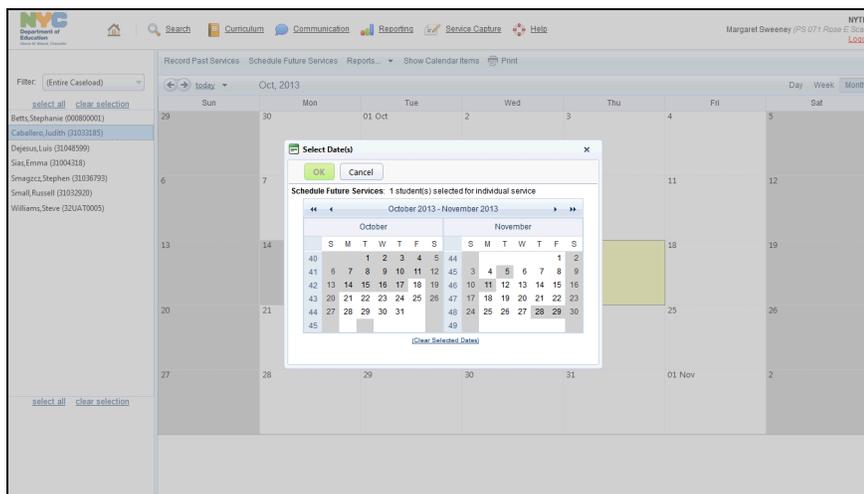
Step	Action
3.	Click the name of the student for which you wish to schedule services. Click to select Caballero, Judith .



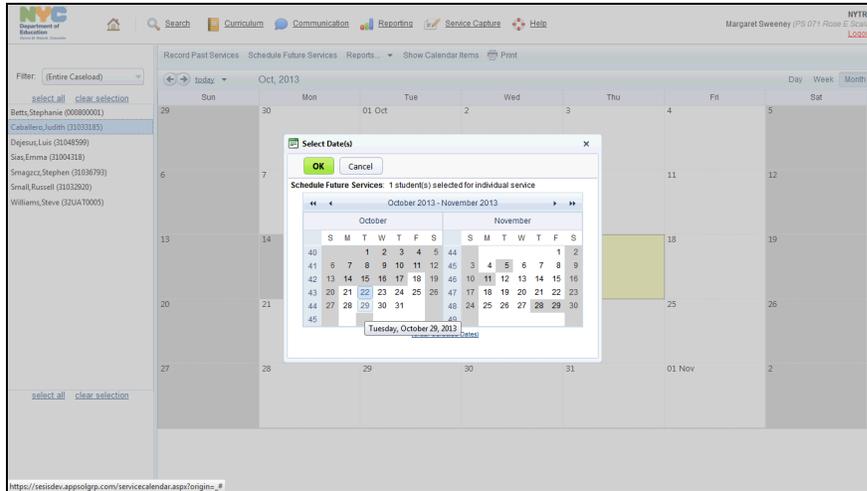
Step	Action
4.	Click the Schedule Future Services link.



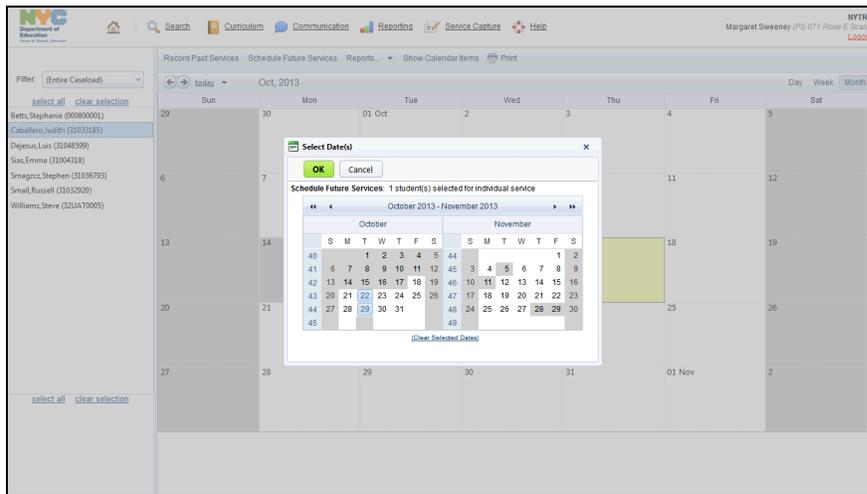
Step	Action
5.	Use this calendar to select the dates to record service. You may select multiple dates. You can schedule future services for the entire school year, but you can only schedule them two months at a time.



Step	Action
6.	Click on the 22 to select October 22nd. 22



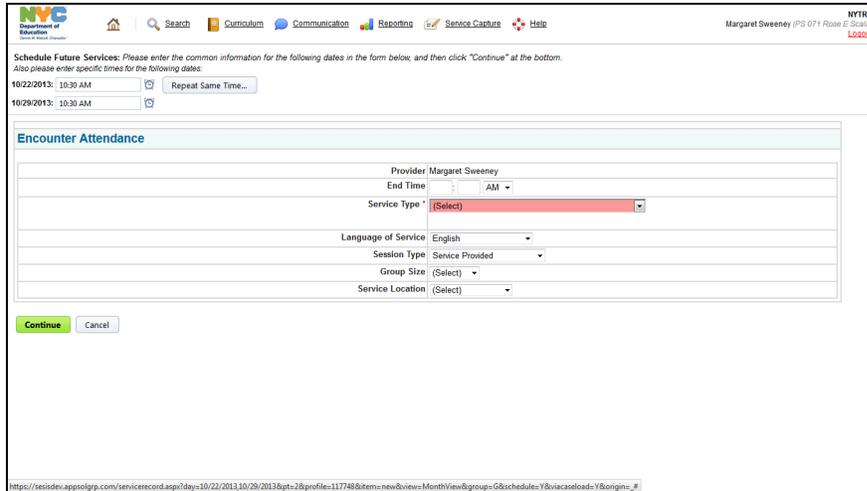
Step	Action
7.	Click on the 29 to select October 29th.



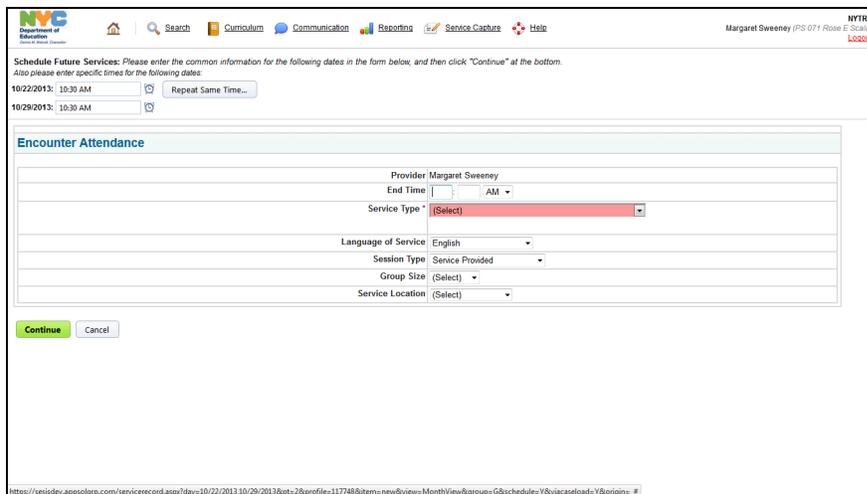
Step	Action
8.	The selected dates are now highlighted in blue. Click the OK button.

Step	Action
9.	Click the clock icon to select a service time. 

Step	Action
10.	Click to select 10:30 AM . 



Step	Action
11.	<p>You have selected 10:30AM for the first service date. You may either enter a different time for the second date or repeat the same time.</p> <p>Click the Repeat Same Time button.</p> <div style="border: 1px solid black; padding: 5px; display: inline-block;">Repeat Same Time...</div>



Step	Action
12.	<p>Enter the session's End Time.</p> <p>Enter "11".</p>

Schedule Future Services: Please enter the common information for the following dates in the form below, and then click "Continue" at the bottom.
Also please enter specific times for the following dates:

10/22/2013: 10:30 AM Repeat Same Time...
10/29/2013: 10:30 AM

Encounter Attendance

Provider: Margaret Sweeney
End Time: 11 : 30 | AM
Service Type: (Select)
Language of Service: English Indicates which service was given.
Session Type: Service Provided
Group Size: (Select)
Service Location: (Select)

Continue Cancel

https://seisdev.appsolgrp.com/servicesrecord.aspx?day=10/22/2013,10/29/2013&pt=28&profile=117748&item=new&view=MonthView&group=G&schedule=Y&vncaseload=Y&origin=#

Step	Action
13.	Click the Service Type dropdown.

Schedule Future Services: Please enter the common information for the following dates in the form below, and then click "Continue" at the bottom.
Also please enter specific times for the following dates:

10/22/2013: 10:30 AM Repeat Same Time...
10/29/2013: 10:30 AM

Encounter Attendance

Provider: Margaret Sweeney
End Time: 11 : 30 | AM
Service Type: (Select)
Language of Service: English Indicates which service was given.
Session Type: Service Provided
Group Size: (Select)
Service Location: (Select)

Continue Cancel

https://seisdev.appsolgrp.com/servicesrecord.aspx?day=10/22/2013,10/29/2013&pt=28&profile=117748&item=new&view=MonthView&group=G&schedule=Y&vncaseload=Y&origin=#

Step	Action
14.	Click to select the service type. For this example, click Counseling Services .

Step	Action
15.	<p>Select the Language of Service from the dropdown.</p> <p>Note: The language of service defaults to English, but you can select another language from the dropdown.</p> <p>Click the list.</p> 

Step	Action
16.	<p>The Session Type will default to Session Provided, but can be changed in the case of absence or cancellation when certifying the service.</p> 

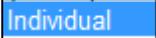
Schedule Future Services: Please enter the common information for the following dates in the form below, and then click "Continue" at the bottom.
Also please enter specific times for the following dates:

10/22/2013: 10:30 AM Repeat Same Time...
10/29/2013: 10:30 AM

Encounter Attendance

Provider: Margaret Sweeney
End Time: 11 : 30 AM
Service Type: Counseling Services
Language of Service: English
Session Type: Service Provided
Group Size: (Select)
Service Location: (Select)

<https://segidv.appsollp.com/servicesrecord.asp?day=10/22/2013/10/29/2013&pt=2&profile=117748&item=new&view=MonthView&group=G&schedule=Y&vaccessload=Y&origin=#>

Step	Action
17.	Click to select Individual from the Group Size dropdown. 

Schedule Future Services: Please enter the common information for the following dates in the form below, and then click "Continue" at the bottom.
Also please enter specific times for the following dates:

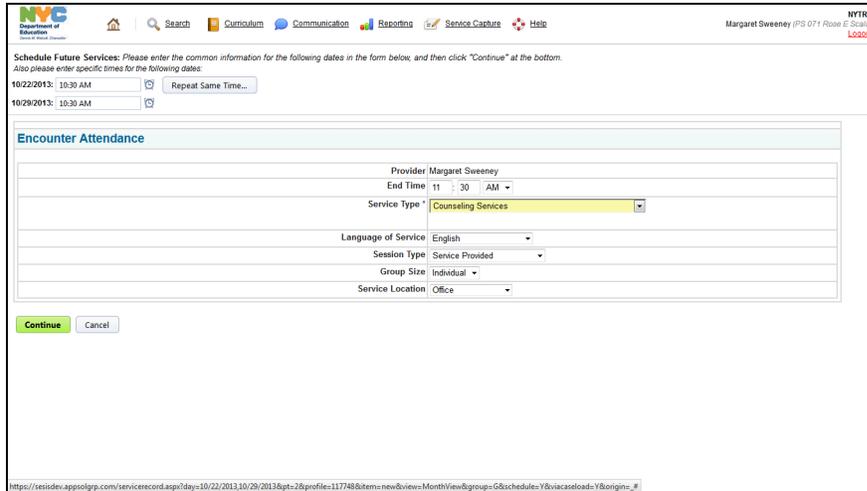
10/22/2013: 10:30 AM Repeat Same Time...
10/29/2013: 10:30 AM

Encounter Attendance

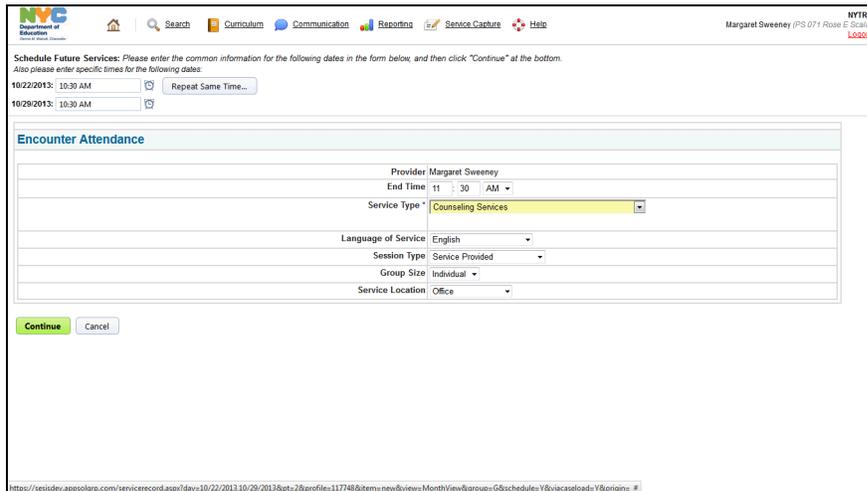
Provider: Margaret Sweeney
End Time: 11 : 30 AM
Service Type: Counseling Services
Language of Service: English
Session Type: Service Provided
Group Size: Individual
Service Location: (Select)

<https://segidv.appsollp.com/servicesrecord.asp?day=10/22/2013/10/29/2013&pt=2&profile=117748&item=new&view=MonthView&group=G&schedule=Y&vaccessload=Y&origin=#>

Step	Action
18.	Click to select Office from the Service Location dropdown. Click the Service Record ROLE_SYSTEM_DOCUMENT. 



Step	Action
19.	Note: Some Service Types will also have a Service Description section with checkboxes to select one or more service descriptions. CPT Codes used for Medicaid billing will also be displayed for each one.



Step	Action
20.	Click the Continue button.



Schedule Future Services:
 Select Record: Caballero, Judith (31033185) - 10/22/2013 # Records Saved: 0 of 2
 Complete the record below and click "Save" at the bottom.

Encounter Attendance

Student: Judith Caballero
 Student ID: 31033185
 Provider: Margaret Sweeney
 Date of Service and Start Time: 10/22/2013 10:30 AM (hh:mm)
 End Time: 11:30 AM
 Service Type: Counseling Services
 Language of Service: English
 Session Type: Service Provided
 Duration: [empty]
 Group Size: Individual
 Service Location: Office
 Progress Indicator: (Select)
 Session Notes: [empty]

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.

Step	Action
21.	Since this is a future service, you will not yet enter the Progress Indicator, Session Notes, or Certification of Services fields.

* Be sure to enter these key fields.

Save **Cancel**

Step	Action
22.	Click the Save button.



NYC Department of Education

Search Curriculum Communication Reporting Service Capture Help

Margaret Sweeney (PS 071 Rose) E-Selects Logout

Schedule Future Services:

Select Record: Caballero, Judith (31033185) - 10/22/2013 (SAVED) # Records Saved: 1 of 2

Review the record below. Use the dropdown above to select the next record or click [Edit](#) to revise this record.

Encounter Attendance

Student: Judith Caballero
 Student ID: 31033185
 Provider: Margaret Sweeney
 Date of Service and Start Time: 10/22/2013, 10:30 AM
 End Time: 11:30 AM
 Service Type: Counseling Services
 Language of Service: English
 Session Type: Service Provided
 Duration: 60 minutes
 Group Size: Individual
 Service Location: Office
 Progress Indicator:
 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 as documented in this record, and to the truth of the information it contains.

Step	Action
23.	The service has been saved. Next to the date it is indicated as "Saved" and 1 out of 2 records have been saved.

NYC Department of Education

Search Curriculum Communication Reporting Service Capture Help

Margaret Sweeney (PS 071 Rose) E-Selects Logout

Schedule Future Services:

Select Record: Caballero, Judith (31033185) - 10/22/2013 (SAVED) # Records Saved: 1 of 2

Review the record below. Use the dropdown above to select the next record or click [Edit](#) to revise this record.

Encounter Attendance

Student: Judith Caballero
 Student ID: 31033185
 Provider: Margaret Sweeney
 Date of Service and Start Time: 10/22/2013, 10:30 AM
 End Time: 11:30 AM
 Service Type: Counseling Services
 Language of Service: English
 Session Type: Service Provided
 Duration: 60 minutes
 Group Size: Individual
 Service Location: Office
 Progress Indicator:
 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 as documented in this record, and to the truth of the information it contains.

Step	Action
24.	Click the Select Record dropdown to schedule another service. Click to select the 10/29/2013 service date.

Schedule Future Services:
 Select Record: Caballero, Judith (31033185) - 10/29/2013 # Records Saved: 1 of 2

Encounter Attendance

Student: Judith Caballero
 Student ID: 31033185
 Provider: Margaret Sweeney
 Date of Service and Start Time: 10/29/2013 10:30 AM (hh:mm)
 End Time: 11:30 AM
 Service Type: Counseling Services
 Language of Service: English
 Session Type: Service Provided
 Duration: 60 minutes
 Group Size: Individual
 Service Location: Office
 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 as documented in this record, and to the truth of the information it contains.

* Be sure to enter these key fields.

Step	Action
25.	After reviewing and/or making changes to the information for this session, click the Save button. 

NYC Department of Education
 Search Curriculum Communication Reporting Service Capture Help
 Margaret Sweeney (PS 071 Rose E. Scala) Logout

Services Calendar Service Record

Select Record: Caballero, Judith (31033185) - 10/29/2013 (SAVED) # Records Saved: 2 of 2
 All records have been saved. Click the Services Calendar link to enter additional services or click [Edit](#) to revise this record.

Encounter Attendance

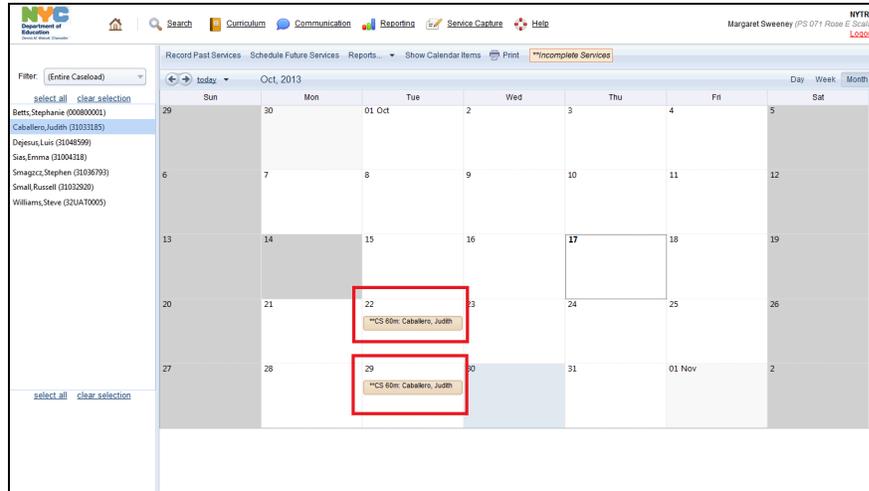
Student: Judith Caballero
 Student ID: 31033185
 Provider: Margaret Sweeney
 Date of Service and Start Time: 10/29/2013, 10:30 AM
 End Time: 11:30 AM
 Service Type: Counseling Services
 Language of Service: English
 Session Type: Service Provided
 Duration: 60 minutes
 Group Size: Individual
 Service Location: Office
 Progress Indicator:
 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.

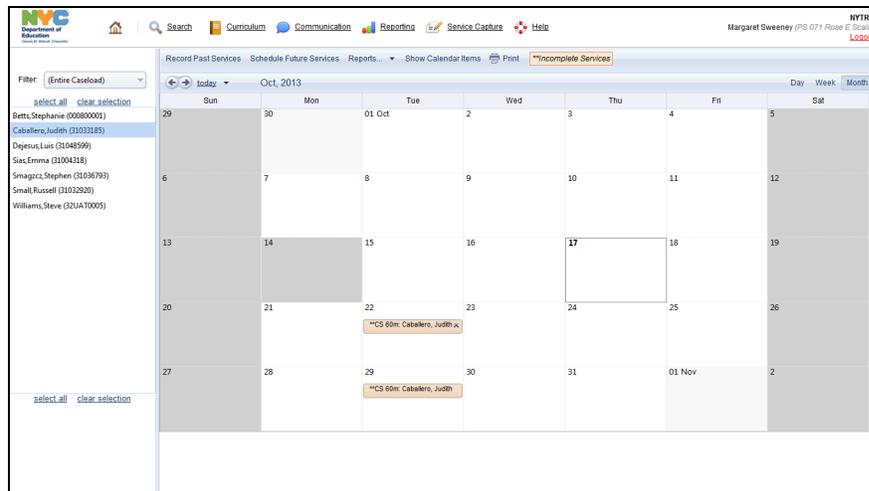
I certify that I was approved by the NYC DOE to provide the services, that I provided the services as documented in this record, and to the truth of the information it contains.

javascript:_doPostBack('cd0051NPageContentCtrl2');

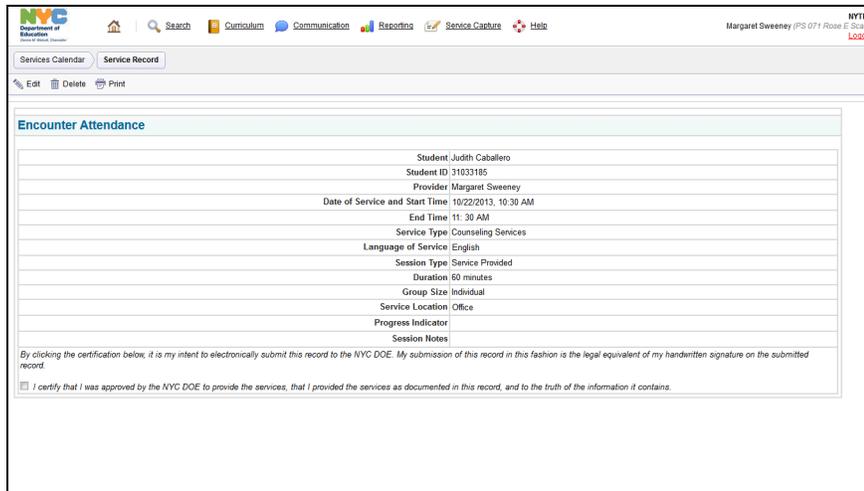
Step	Action
26.	Click the Service Calendar link to view the scheduled session on the calendar. Services Calendar



Step	Action
27.	The scheduled future service date now appears on the Service Capture calendar. Note: Other providers cannot see scheduled services. Other service providers with access to the student can only see completed and certified Service Records.



Step	Action
28.	Double-click to view the service details CS 60m: Caballero, Judith

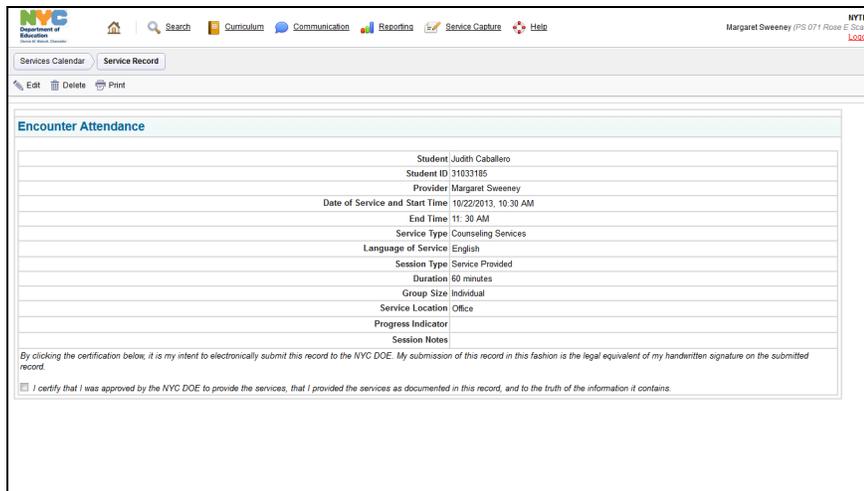


The screenshot shows the 'Service Record' page in SEGIS. The user is logged in as Margaret Sweeney. The page displays details for an 'Encounter Attendance' record. The details include:

- Student: Judith Caballero
- Student ID: 31033185
- Provider: Margaret Sweeney
- Date of Service and Start Time: 10/22/2013, 10:30 AM
- End Time: 11:30 AM
- Service Type: Counseling Services
- Language of Service: English
- Session Type: Service Provided
- Duration: 60 minutes
- Group Size: Individual
- Service Location: Office
- Progress Indicator
- Session Notes

At the bottom of the form, there is a certification statement: "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." Below this statement is a checkbox with the text: "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."

Step	Action
29.	<p>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 SEGIS.</p> <p>You may print or delete a scheduled session, if needed, by using the Print or Delete links in the action toolbar.</p>



This screenshot is identical to the one above, showing the 'Service Record' page for Judith Caballero with the same details and certification statement.

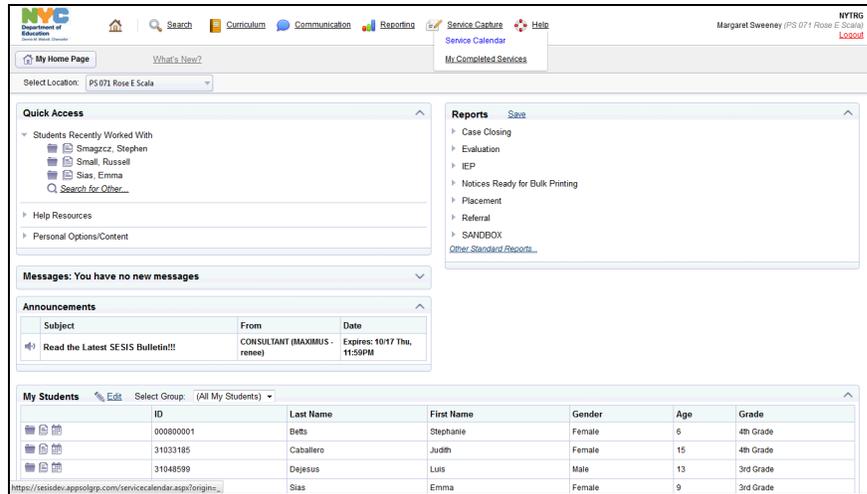
Step	Action
30.	<p>This concludes the lesson on scheduling future services.</p> <p>End of Procedure.</p>

Recording a Past Service

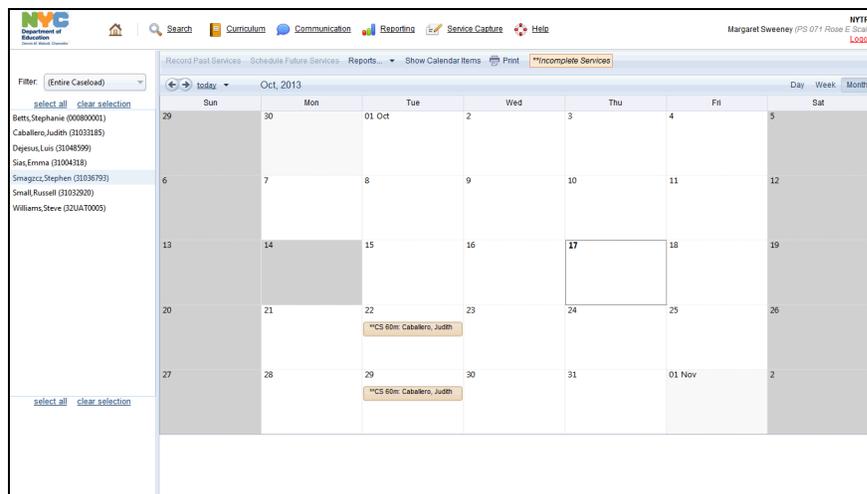
- All services must be completed and certified prior to the 15th of the month following the service.

Procedure

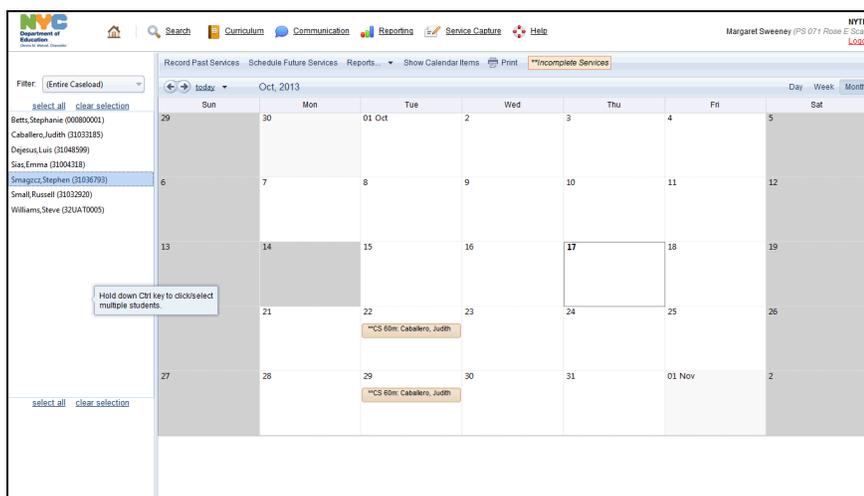
This lesson will guide you through the process of recording a past service.



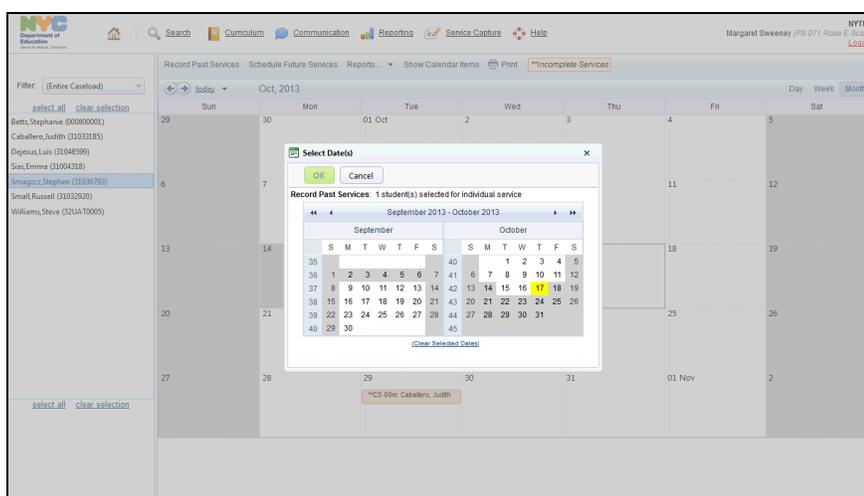
Step	Action
1.	<p>Click the Service Calendar link from your homepage to open your service capture calendar.</p> <p>Alternatively, you can click the Select dropdown button from a student's name that is on your caseload.</p> <p>Service Calendar</p>



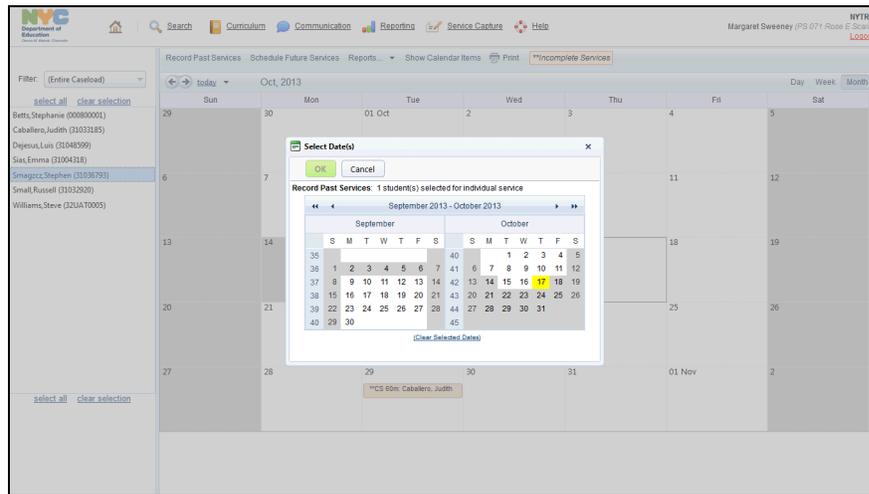
Step	Action
2.	<p>Click the name of the student for which you wish to record services.</p> <p>Click to select Smagocz,Stephen.</p> <p>Smagocz,Stephen (31036793)</p>



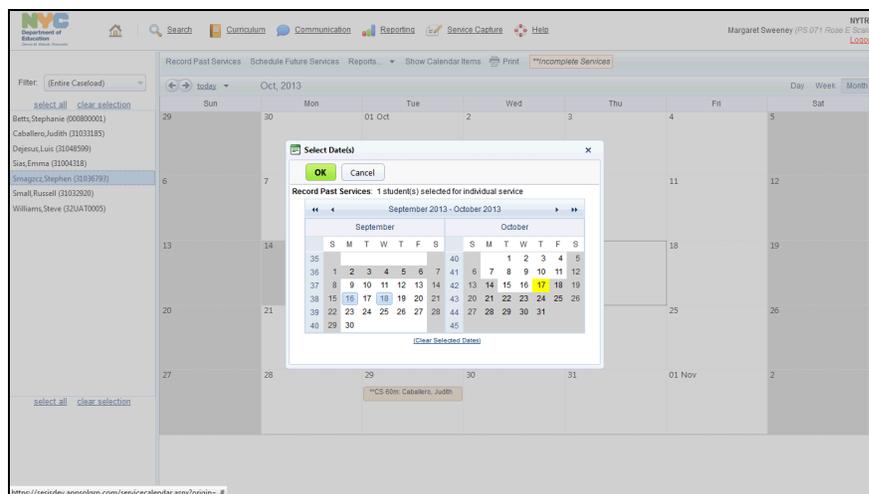
Step	Action
3.	<p>Click the Record Past Services link.</p> <p>Record Past Services</p>



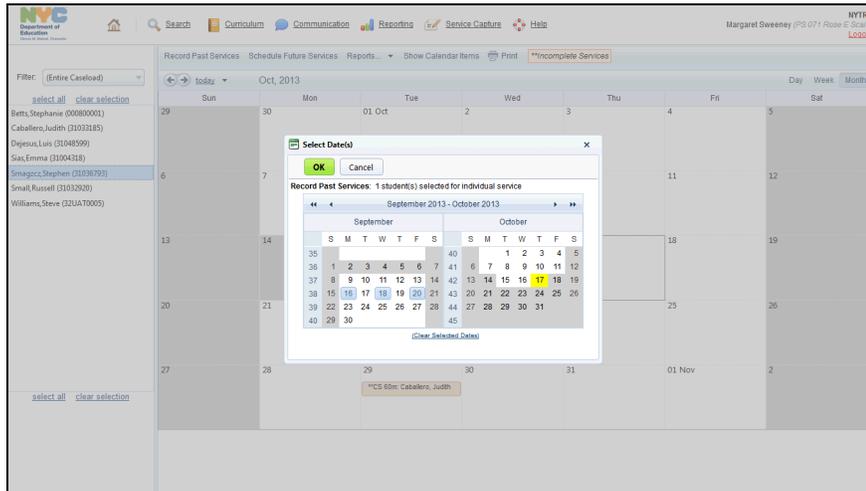
Step	Action
4.	Use this calendar to select the dates to record service. You may select multiple dates. You may record multiple services for the same student on the same day, as long as the sessions do not overlap.



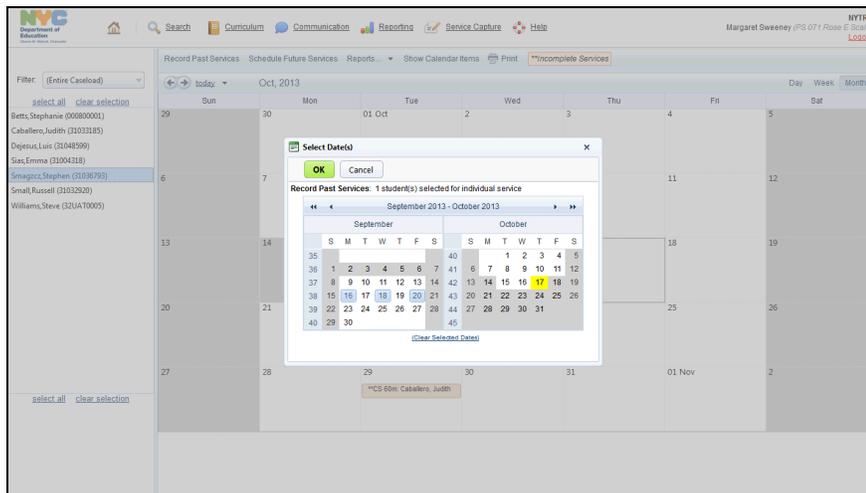
Step	Action
5.	Click the 16 to select September 16th.



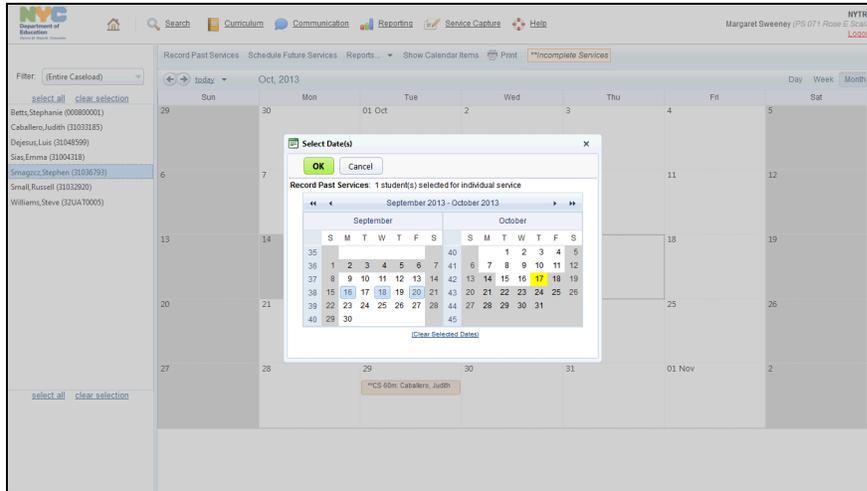
Step	Action
6.	Click the 18 to select September 18th.



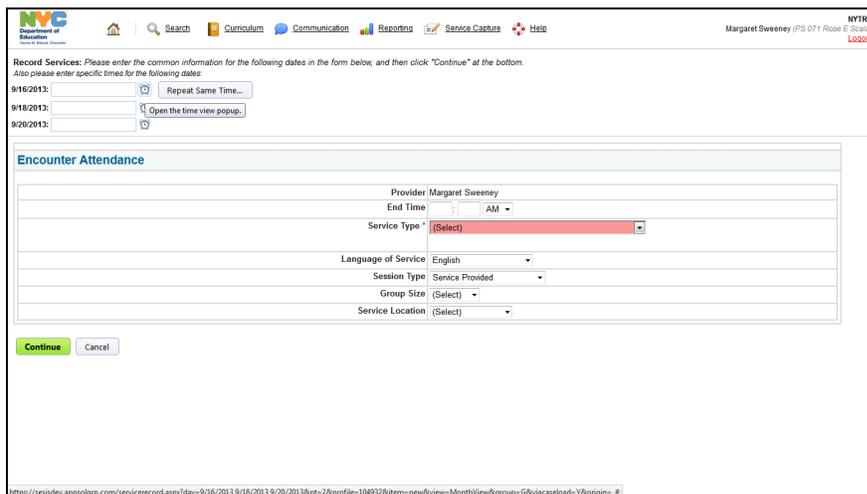
Step	Action
7.	Click the 20 to select September 20th. 20



Step	Action
8.	The selected dates are now highlighted in blue. Today's date is highlighted in yellow.



Step	Action
9.	Click the OK button. 



Step	Action
10.	Click the clock icon to select a service time. 

Step	Action
11.	Click to select 9:30 AM .

Step	Action
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.

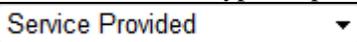
Step	Action
13.	9:30 AM has been entered as the time for all three service dates.

Step	Action
14.	<p>Enter the appropriate information into the End Time field.</p> <p>Enter "10".</p> <p>Note: If the session runs longer than scheduled, you should record the actual start and end times.</p>

Step	Action
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.

Step	Action
16.	Click to select Speech-Language Therapy .

Step	Action
17.	Select the Language of Service from the dropdown. The language of service is defaulted to English, but you can select a different language from the dropdown. Point to the Language of Service list.

Step	Action
18.	Click the Session Type dropdown and select Service Provided . 

Record Services: Please enter the common information for the following dates in the form below, and then click "Continue" at the bottom. Also please enter specific times for the following dates:

9/16/2013: 9:30 AM

9/18/2013: 9:30 AM

9/20/2013: 9:30 AM

Each student must have one Speech-Language Referral completed per calendar year. Complete the Speech-Language Referral as soon as possible upon seeing the student.

Encounter Attendance

Provider: Margaret Sweeney

End Time: 10 : 30 AM

Service Type: Speech-Language Therapy

Language of Service: English

Session Type: Service Provided

Group Size: (Select)

Service Location: Individual

Service Description:

- Articulation/ Intelligibility
- Attention, memory, and problem solving
- Auditory Processing
- Augmentive Alternative Communication
- Augmentive Alternative Communication Reevaluation
- Fluency
- Language - Morphology/Syntax
- Language - Narrative/Expository discourse
- Language - Pragmatic/ Social Scripts

Step	Action
19.	<p>Click to select Individual from the Group Size dropdown.</p> <p>Note: When recording a split mandate, complete separate Service Records for both the individual and group sessions on the dates and times when they occurred. To differentiate between the two, select the appropriate group size on this dropdown.</p> <p>Individual</p>

Record Services: Please enter the common information for the following dates in the form below, and then click "Continue" at the bottom. Also please enter specific times for the following dates:

9/16/2013: 9:30 AM

9/18/2013: 9:30 AM

9/20/2013: 9:30 AM

Each student must have one Speech-Language Referral completed per calendar year. Complete the Speech-Language Referral as soon as possible upon seeing the student.

Encounter Attendance

Provider: Margaret Sweeney

End Time: 10 : 30 AM

Service Type: Speech-Language Therapy

Language of Service: English

Session Type: Service Provided

Group Size: (Select)

Service Location: Therapy Room

Service Description:

- Articulation/ Intelligibility - CPT Code 92507
- Attention, memory, and problem solving - CPT Code 92507
- Auditory Processing - CPT Code 92507
- Augmentive Alternative Communication - CPT Code 92507
- Augmentive Alternative Communication Reevaluation - CPT Code 92506
- Fluency - CPT Code 92507
- Language - Morphology/Syntax - CPT Code 92507

Step	Action
20.	<p>Click to select Therapy Room from the Service Location dropdown.</p> <p>Therapy Room</p>

Step	Action
21.	Note that CPT Codes used for Medicaid billing will be displayed for each service description. Note: Not all Service Types will have a Service Description field or CPT codes.

Step	Action
22.	Click to select the Voice the option under Service Description. <input checked="" type="checkbox"/>

Encounter Attendance

Provider: Margaret Sweeney
 End Time: 10 : 30 AM
 Service Type: Speech-Language Therapy
 Language of Service: English
 Session Type: Service Provided
 Group Size: Individual
 Service Location: Therapy Room

Service Description

- Articulation/ Intelligibility - CPT Code 92507
- Attention, memory, and problem solving - CPT Code 92507
- Auditory Processing - CPT Code 92507
- Augmentive Alternative Communication - CPT Code 92507
- Augmentive Alternative Communication Reevaluation - CPT Code 92506
- Fluency - CPT Code 92507
- Language - Morphology/Syntax - CPT Code 92507
- Language - Narrative/Expository discourse - CPT Code 92507
- Language - Pragmatics/ Social Scripts - CPT Code 92507
- Language - Vocabulary/ Semantics - CPT Code 92507
- Phonemic Awareness - CPT Code 92507
- Phonology - CPT Code 92507
- Sensory Processing - CPT Code 92507
- Speech / Language Reevaluation - CPT Code 92506
- Voice - CPT Code 92507
- Other

Step	Action
23.	Click to select the Fluency option under Service Description. <input type="checkbox"/>

Encounter Attendance

Provider: Margaret Sweeney
 End Time: 10 : 30 AM
 Service Type: Speech-Language Therapy
 Language of Service: English
 Session Type: Service Provided
 Group Size: Individual
 Service Location: Therapy Room

Service Description

- Articulation/ Intelligibility - CPT Code 92507
- Attention, memory, and problem solving - CPT Code 92507
- Auditory Processing - CPT Code 92507
- Augmentive Alternative Communication - CPT Code 92507
- Augmentive Alternative Communication Reevaluation - CPT Code 92506
- Fluency - CPT Code 92507
- Language - Morphology/Syntax - CPT Code 92507
- Language - Narrative/Expository discourse - CPT Code 92507
- Language - Pragmatics/ Social Scripts - CPT Code 92507
- Language - Vocabulary/ Semantics - CPT Code 92507
- Phonemic Awareness - CPT Code 92507
- Phonology - CPT Code 92507
- Sensory Processing - CPT Code 92507
- Speech / Language Reevaluation - CPT Code 92506
- Voice - CPT Code 92507
- Other

Continue

Step	Action
24.	Click the Continue button.

The screenshot shows the SE SIS form interface. At the top, 'Group Size' is set to 'Individual' and 'Service Location' is 'Therapy Room'. The 'Service Description' section contains a list of CPT codes with checkboxes. The 'Progress Indicator' dropdown menu is open, showing '(Select)'. Below the dropdown is the 'Session Notes' field, which is currently empty. At the bottom, there is a certification statement and a note: '* Be sure to enter these key fields.' with 'Save' and 'Cancel' buttons.

Step	Action
25.	Click the Progress Indicator dropdown. The Progress Indicator refers to the annual goals on the student's IEP.

This screenshot is similar to the previous one, but the 'Progress Indicator' dropdown menu is now open and shows four options: '(Select)', 'Student made expected progress toward goal attainment', 'Student made partial progress toward goal attainment', and 'Student responded positively to intervention, however, no Progress Indicator goal attainment noted'. The first option, 'Student made expected progress toward goal attainment', is highlighted in blue. The 'Session Notes' field is now populated with the text: 'Student made expected progress toward goal attainment. Student made partial progress toward goal attainment. Student responded positively to intervention, however, no Progress Indicator goal attainment noted. Student did not make progress toward goal attainment in this session.'

Step	Action
26.	Click to select Student made expected progress toward goal attainment.

Group Size: Individual
Service Location: Therapy Room

Service Description:

- Articulation/Intelligibility - CPT Code 92507
- Attention, memory, and problem solving - CPT Code 92507
- Auditory Processing - CPT Code 92507
- Augmentive Alternative Communication - CPT Code 92507
- Augmentive Alternative Communication Reevaluation - CPT Code 92506
- Fluency - CPT Code 92507
- Language - Morphology/Syntax - CPT Code 92507
- Language - Narrative/Expository discourse - CPT Code 92507
- Language - Pragmatics/ Social Scripts - CPT Code 92507
- Language - Vocabulary/ Semantics - CPT Code 92507
- Phonemic Awareness - CPT Code 92507
- Phonology - CPT Code 92507
- Sensory Processing - CPT Code 92507
- Speech / Language Reevaluation - CPT Code 92506
- Voice - CPT Code 92507
- Other

Progress Indicator: Student made expected progress toward goal attainment

Session Notes: [Redacted]

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.

Step	Action
27.	<p>You should type your session notes and certify the Service Record as soon as possible after you have delivered the service.</p> <p>Session Notes are required to complete a past service, with the following exceptions: ESL teachers, SETSS teachers, and Paraprofessionals. Additionally, you do not need to provide session notes for cancellations and absences. If you have further questions regarding Session Notes, please reach out to your supervisor.</p> <p>All providers with access to the same student can see the certified Session Notes associated with that student. Encounter attendance Service Records, including Session Notes, are permanent archives of the student’s file on SE SIS and are maintained indefinitely.</p> <p>If notes are stored elsewhere due to privacy concerns, Social Workers, Guidance Counselors, and Psychologists who provide counseling services should indicate in the Session Notes where their detailed notes on the session are located.</p>

Group Size: Individual
Service Location: Therapy Room

Service Description:

- Articulation/Intelligibility - CPT Code 92507
- Attention, memory, and problem solving - CPT Code 92507
- Auditory Processing - CPT Code 92507
- Augmentive Alternative Communication - CPT Code 92507
- Augmentive Alternative Communication Reevaluation - CPT Code 92506
- Fluency - CPT Code 92507
- Language - Morphology/Syntax - CPT Code 92507
- Language - Narrative/Expository discourse - CPT Code 92507
- Language - Pragmatics/ Social Scripts - CPT Code 92507
- Language - Vocabulary/ Semantics - CPT Code 92507
- Phonemic Awareness - CPT Code 92507
- Phonology - CPT Code 92507
- Sensory Processing - CPT Code 92507
- Speech / Language Reevaluation - CPT Code 92506
- Voice - CPT Code 92507
- Other

Progress Indicator: Student made expected progress toward goal attainment

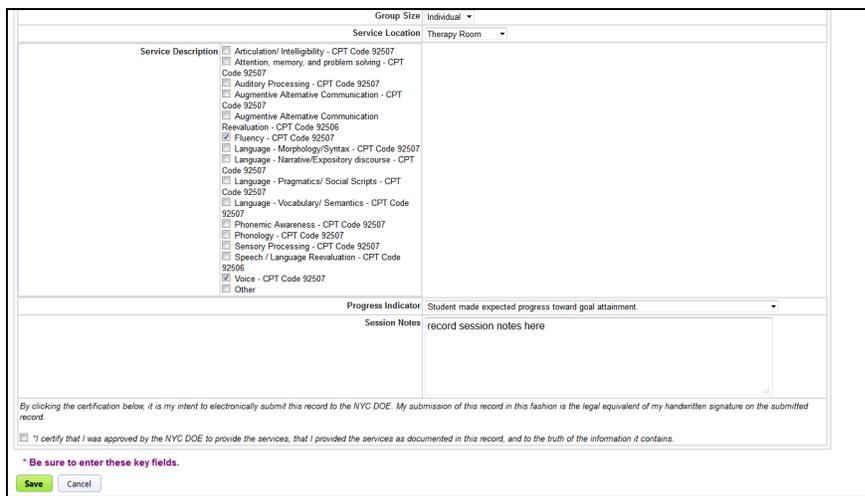
Session Notes: record session notes here

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.

Step	Action
28.	<p>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.</p> <p>All services must be completed and certified prior to the 15th of the month following the service.</p> <p>All past sessions must be certified. Service Records for past services that are not certified are incomplete and will not appear on the Encounter Attendance reports.</p>



Group Size: Individual
Service Location: Therapy Room

Service Description

- Articulation/Intelligibility - CPT Code 92507
- Attention, memory, and problem solving - CPT Code 92507
- Auditory Processing - CPT Code 92507
- Augmentative Alternative Communication - CPT Code 92507
- Augmentative Alternative Communication Reevaluation - CPT Code 92506
- Fluency - CPT Code 92507
- Language - Morphology/Syntax - CPT Code 92507
- Language - Narrative/Expository discourse - CPT Code 92507
- Language - Pragmatics/ Social Scripts - CPT Code 92507
- Language - Vocabulary/ Semantics - CPT Code 92507
- Phonemic Awareness - CPT Code 92507
- Phonology - CPT Code 92507
- Sensory Processing - CPT Code 92507
- Speech / Language Reevaluation - CPT Code 92506
- Voice - CPT Code 92507
- Other

Progress Indicator: Student made expected progress toward goal attainment.

Session Notes: record session notes here

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

Step	Action
29.	<p>Click the checkbox to certify this service.</p> <input type="checkbox"/>

Group Size: Individual
Service Location: Therapy Room

Service Description

- Articulation/Intelligibility - CPT Code 92507
- Attention, memory, and problem solving - CPT Code 92507
- Auditory Processing - CPT Code 92507
- Augmentive Alternative Communication - CPT Code 92507
- Augmentive Alternative Communication Reevaluation - CPT Code 92506
- Fluency - CPT Code 92507
- Language - Morphology/Syntax - CPT Code 92507
- Language - Narrative/Expository discourse - CPT Code 92507
- Language - Pragmatics/ Social Scripts - CPT Code 92507
- Language - Vocabulary/ Semantics - CPT Code 92507
- Phonemic Awareness - CPT Code 92507
- Phonology - CPT Code 92507
- Sensory Processing - CPT Code 92507
- Speech / Language Reevaluation - CPT Code 92506
- Voice - CPT Code 92507
- Other

Progress Indicator: Student made expected progress toward goal attainment.

Session Notes: record session notes here

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.**

Step	Action
30.	Click the Save button. 

NYC Department of Education

Search Curriculum Communication Reporting Service Capture Help

Margaret Sweeney (PS 071 Rose E. Scoble) Logout

Record Services:

Select Record: Smagzcz, Stephen (31036793) **9/16/2013 (SAVED)** # Records Saved: **1** of **3**

Review the record below. Use the dropdown above to select the next record or click [%_Edit](#) to revise this record.

Encounter Attendance

Student	Stephen Smagzcz
Student ID	31036793
Provider	Margaret Sweeney
Date of Service and Start Time	09/16/2013, 09:30 AM
End Time	10:30 AM
Service Type	Speech-Language Therapy
Language of Service	English
Session Type	Service Provided
Duration	60 minutes
Group Size	Individual
Service Location	Therapy Room
Service Description	<input checked="" type="checkbox"/> Fluency - CPT Code 92507 <input checked="" type="checkbox"/> Voice - CPT Code 92507
Progress Indicator	Student made expected progress toward goal attainment.
Session Notes	record session notes here

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.

Step	Action
31.	The service has been saved. Next to the date it is indicated as "Saved" and 1 out of 2 records have been saved.

Record Services:
 Select Record: Smagzcz, Stephen (31036793) - 9/16/2013 (SAVED) # Records Saved: 1 of 3
 Review the record below. Use the dropdown above to select the next record or click [Edit](#) to revise this record.

Encounter Attendance

Student: Stephen Smagzcz
 Student ID: 31036793
 Provider: Margaret Sweeney
 Date of Service and Start Time: 09/16/2013, 09:30 AM
 End Time: 10:30 AM
 Service Type: Speech-Language Therapy
 Language of Service: English
 Session Type: Service Provided
 Duration: 60 minutes
 Group Size: Individual
 Service Location: Therapy Room
 Service Description: Fluency - CPT Code 92507
 Voice - CPT Code 92507
 Progress Indicator: Student made expected progress toward goal attainment.
 Session Notes: record session notes here

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.

Step	Action
32.	Click the Select Record dropdown to certify another service.

Record Services:
 Select Record: Smagzcz, Stephen (31036793) - 9/16/2013 (SAVED) # Records Saved: 1 of 3
 Review the record below. Use the dropdown above to select the next record or click [Edit](#) to revise this record.

Encounter Attendance

Student: Stephen Smagzcz
 Student ID: 31036793
 Provider: Margaret Sweeney
 Date of Service and Start Time: 09/16/2013, 09:30 AM
 End Time: 10:30 AM
 Service Type: Speech-Language Therapy
 Language of Service: English
 Session Type: Service Provided
 Duration: 60 minutes
 Group Size: Individual
 Service Location: Therapy Room
 Service Description: Fluency - CPT Code 92507
 Voice - CPT Code 92507
 Progress Indicator: Student made expected progress toward goal attainment.
 Session Notes: record session notes here

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.

Step	Action
33.	Click the Select Record dropdown to certify another service. Click to select the 9/18/13 service date.

Record Services:
Select Record: Smagzcz, Stephen (31036793) - 9/18/2013 # Records Saved: 1 of 3

• Each student must have one Speech-Language Referral completed per calendar year. Complete the Speech-Language Referral as soon as possible upon seeing the student.

Encounter Attendance

Student: Stephen Smagzcz
Student ID: 31036793
Provider: Margaret Sweeney
Date of Service and Start Time: 09/18/2013 9:30 AM (hh:mm)
End Time: 10:30 AM
Service Type: Speech-Language Therapy
Language of Service: English
Session Type: Service Provided
Duration:
Group Size: Individual
Service Location: Therapy Room

Service Description:
 Articulation/Intelligibility - CPT Code 92507
 Attention, memory, and problem solving - CPT Code 92507
 Auditory Processing - CPT Code 92507
 Augmentative Alternative Communication - CPT Code 92507
 Augmentative Alternative Communication
 Reevaluation - CPT Code 92506
 Fluency - CPT Code 92507
 Language - Morphology/Syntax - CPT Code 92507

Step	Action
34.	You are now viewing the service details for the 9/18 service date. Repeat the previous steps to complete the Progress Indicator, Session Notes, and Certifying a Service.

Record Services:
Select Record: Smagzcz, Stephen (31036793) - 9/18/2013 # Records Saved: 1 of 3

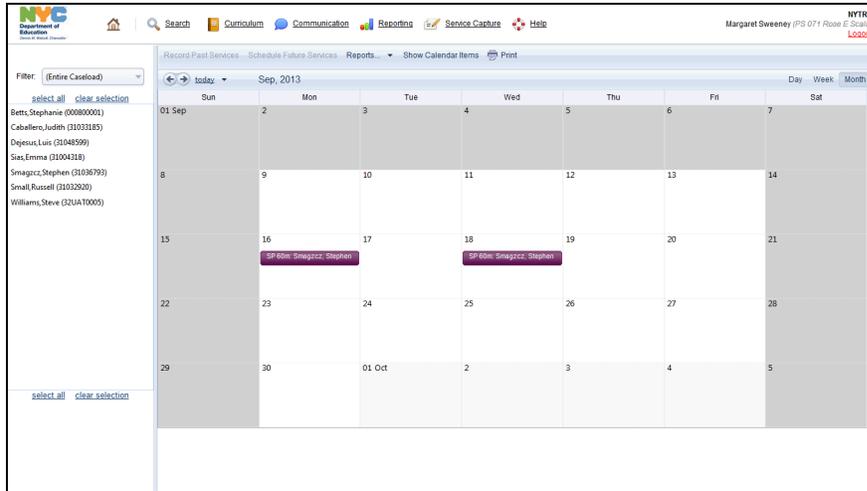
• Each student must have one Speech-Language Referral completed per calendar year. Complete the Speech-Language Referral as soon as possible upon seeing the student.

Encounter Attendance

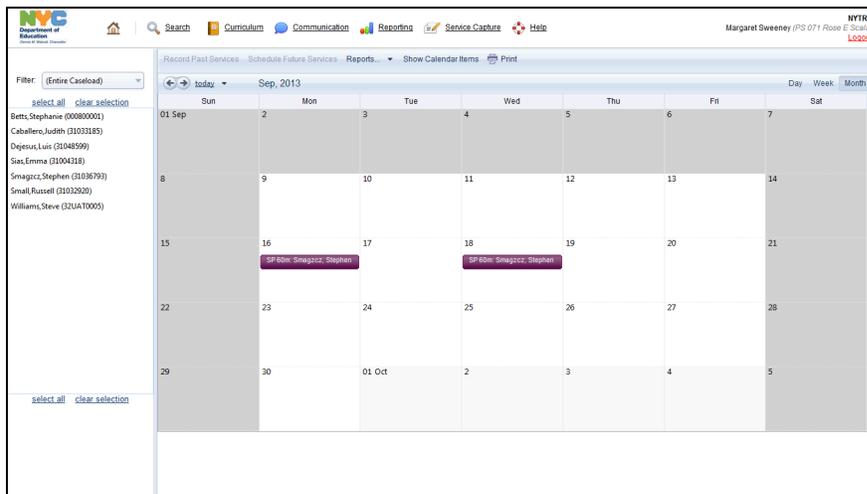
Student: Stephen Smagzcz
Student ID: 31036793
Provider: Margaret Sweeney
Date of Service and Start Time: 09/18/2013 9:30 AM (hh:mm)
End Time: 10:30 AM
Service Type: Speech-Language Therapy
Language of Service: English
Session Type: Service Provided
Duration:
Group Size: Individual
Service Location: Therapy Room

Service Description:
 Articulation/Intelligibility - CPT Code 92507
 Attention, memory, and problem solving - CPT Code 92507
 Auditory Processing - CPT Code 92507
 Augmentative Alternative Communication - CPT Code 92507
 Augmentative Alternative Communication
 Reevaluation - CPT Code 92506
 Fluency - CPT Code 92507
 Language - Morphology/Syntax - CPT Code 92507

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



Step	Action
36.	The service dates now appear on the Service Capture calendar in purple to indicate that they have been completed/certified.



Step	Action
37.	Double-click to view the service details. SP 60m: Smagzcz, Stephen

The screenshot shows the 'Service Record' page in SEGIS. The 'Encounter Attendance' section displays the following details:

- Student: Stephen Smagzcz
- Student ID: 31036793
- Provider: Margaret Sweeney
- Date of Service and Start Time: 09/16/2013, 09:30 AM
- End Time: 10:30 AM
- Service Type: Speech-Language Therapy
- Language of Service: English
- Session Type: Service Provided
- Duration: 60 minutes
- Group Size: Individual
- Service Location: Therapy Room
- Service Description:
 - Fluency - CPT Code 92507
 - Voice - CPT Code 92507
- Progress Indicator: Student made expected progress toward goal attainment.
- Session Notes: record session notes here

At the bottom, there is a certification statement: "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."

Step	Action
38.	<p>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 SEGIS.</p> <p>Note: You may delete a student's record, if needed, by using the Delete link in the Actions toolbar.</p> <p>You may print individual sessions using the Print link in the Actions toolbar. The Services Calendar can also be printed using the monthly, weekly or daily view; however, you may need to adjust your printer settings using Page Setup from the File menu.</p>

This is an identical screenshot of the SEGIS Service Record page as shown in the previous block, displaying the same encounter attendance details for Stephen Smagzcz.

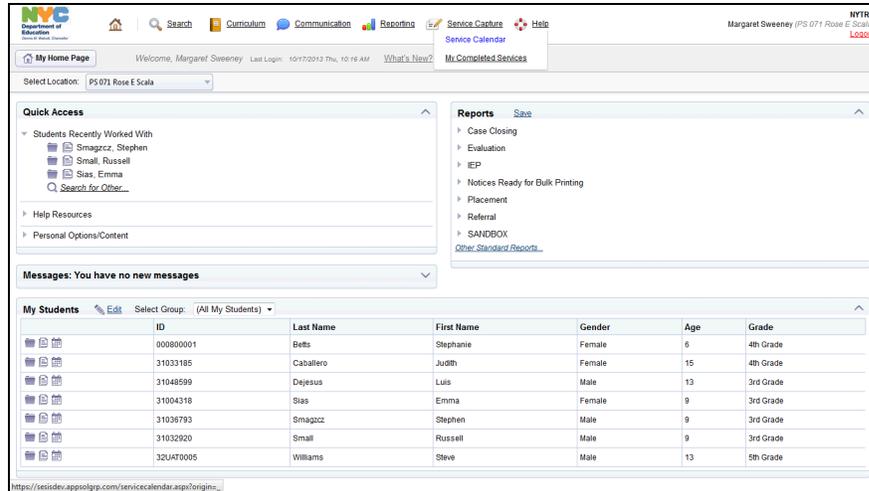
Step	Action
39.	<p>This concludes the lesson on recording a past service. End of Procedure.</p>

Recording/Scheduling Group Services

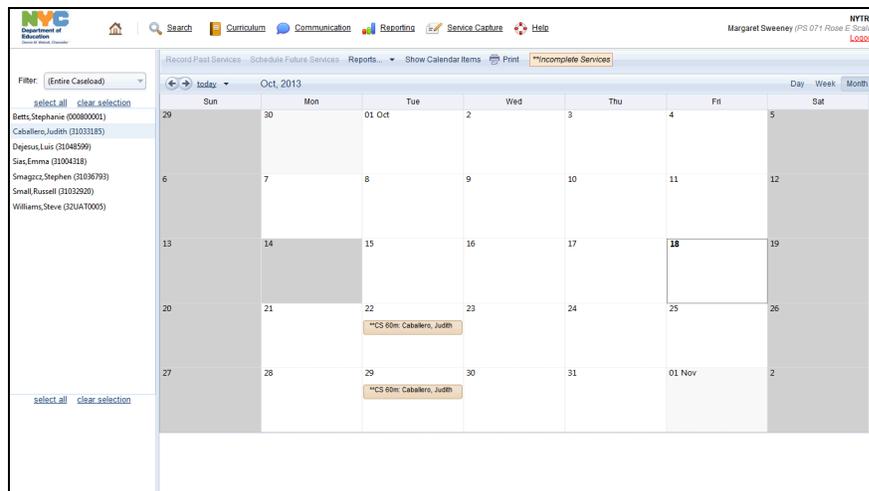
- All services must be completed and certified prior to the 15th of the month following the service.

Procedure

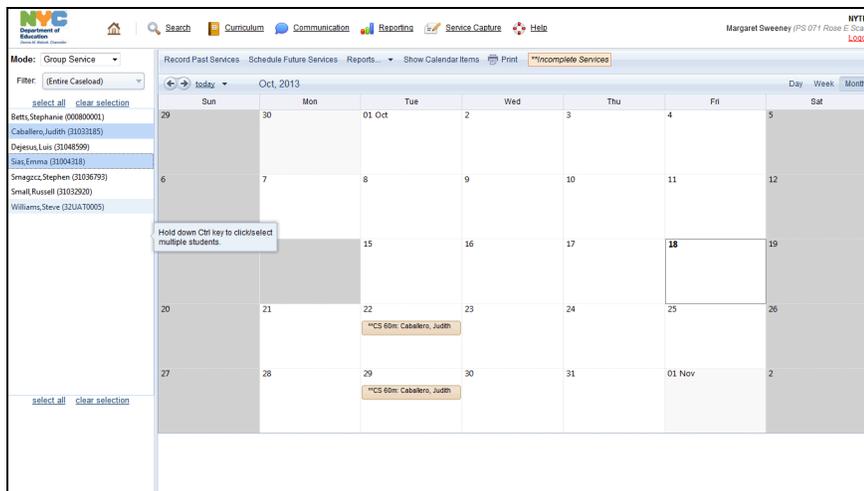
This lesson will guide you through the process of recording or scheduling group services.



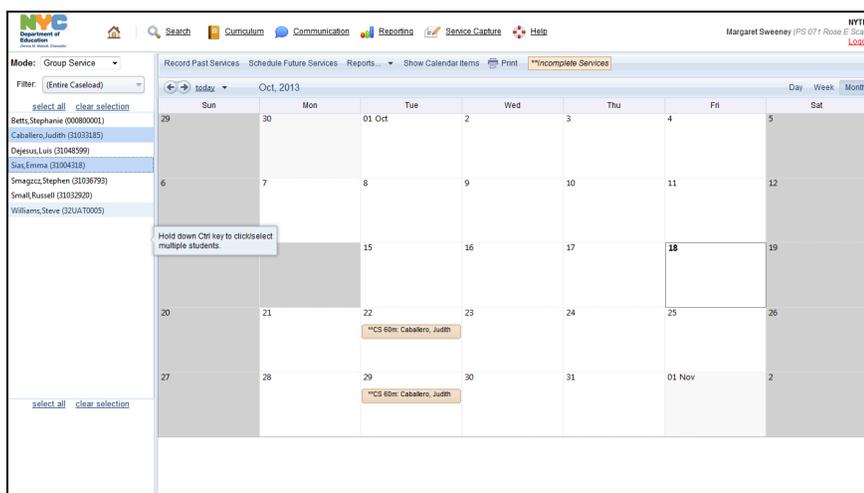
Step	Action
1.	<p>Click the Service Calendar link from your homepage to open your service capture calendar.</p> <p>Alternatively, you can click the Service Calendar icon next to a student's name that is on your caseload.</p> <p>Service Calendar</p>



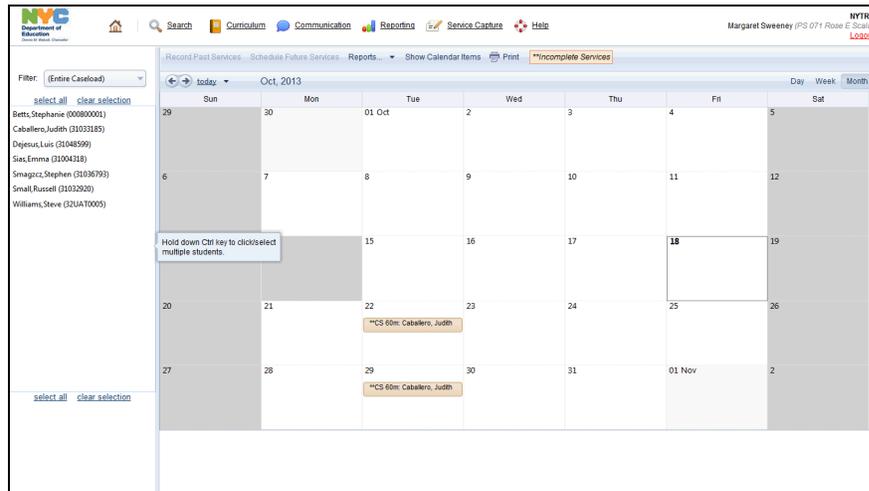
Step	Action
2.	<p>Click the name of the student for which you wish to record services.</p> <p>Click to select Cabellero, Judith.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;"> Caballero, Judith (31033185) </div>

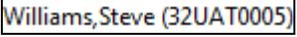


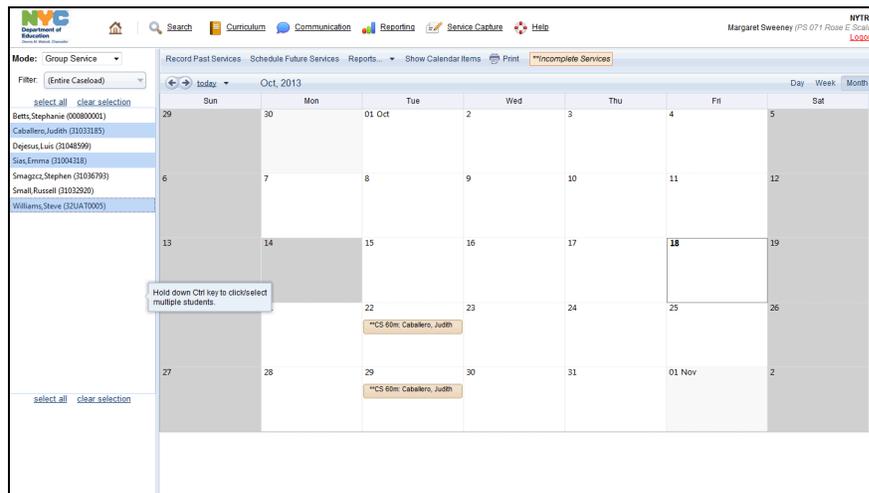
Step	Action
3.	<p>The first student has been selected. To select multiple students, hold down the Ctrl key while clicking on the student's name. You can also use the "select all" link to select all students in the group.</p>

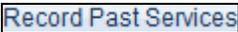


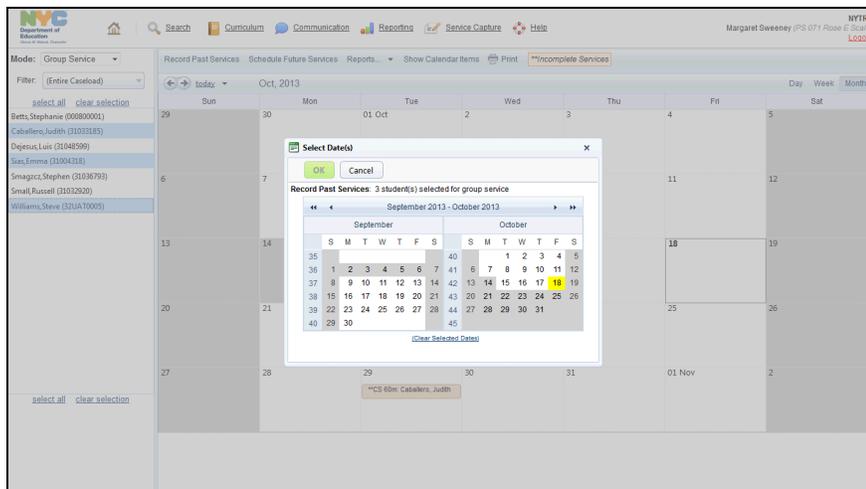
Step	Action
4.	Press the [Ctrl] key and click Sias, Emma . 



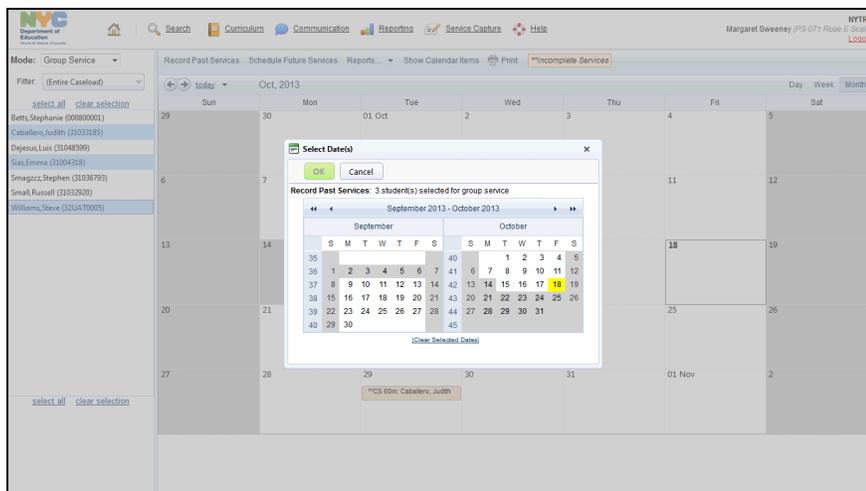
Step	Action
5.	Press the [Ctrl] key and click Williams, Steve . 



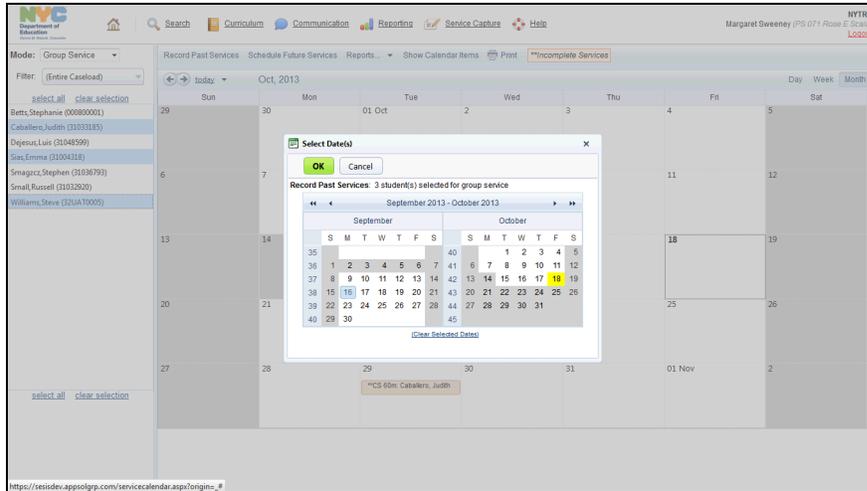
Step	Action
6.	Click the Record Past Services link. 



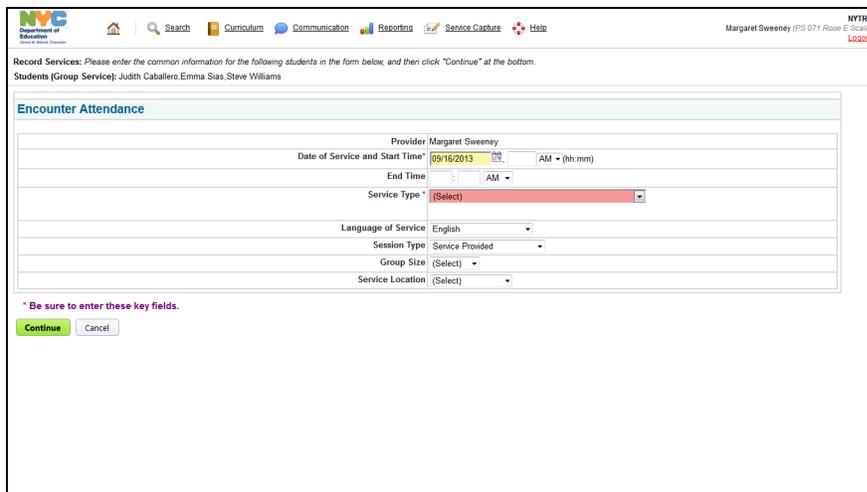
Step	Action
7.	Use this calendar to select the dates to record service. You may select multiple dates.



Step	Action
8.	Click the 16 to select September 16th.



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



Step	Action
10.	<p>Enter the start time into the Time field.</p> <p>Enter "9"</p>

Record Services: Please enter the common information for the following students in the form below, and then click "Continue" at the bottom.
Students (Group Service): Judith Caballero, Emma Sias, Steve Williams

Encounter Attendance

Provider: Margaret Sweeney

Date of Service and Start Time: 09/16/2013 9 AM (hh:mm)

End Time: [Empty] AM

Service Type: (Select)

Language of Service: English

Session Type: Service Provided

Group Size: (Select)

Service Location: (Select)

* Be sure to enter these key fields.

Step	Action
11.	<p>Enter the end time into the End Time field.</p> <p>Enter "10".</p> <p>Note: If the session runs longer than scheduled, you should record the actual start and end times.</p>

Record Services: Please enter the common information for the following students in the form below, and then click "Continue" at the bottom.
Students (Group Service): Judith Caballero, Emma Sias, Steve Williams

Encounter Attendance

Provider: Margaret Sweeney

Date of Service and Start Time: 09/16/2013 9 AM (hh:mm)

End Time: 10 AM

Service Type: (Select)

Language of Service: English

Session Type: Service Provided

Group Size: (Select)

Service Location: (Select)

* Be sure to enter these key fields.

Step	Action
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>

Record Services: Please enter the common information for the following students in the form below, and then click "Continue" at the bottom.
Students (Group Service): Judith Caballero, Emma Sias, Steve Williams

Encounter Attendance

Provider: Margaret Sweeney

Date of Service and Start Time: 09/16/2013 9 AM (hh:mm)

End Time: 10 AM

Service Type * (Select): Adapted Physical Education

Language of Service: English

Session Type: Service Provided

Group Size: (Select)

Service Location: (Select)

* Be sure to enter these key fields.

Continue Cancel

Step	Action
13.	Click to select Adapted Physical Education .

Record Services: Please enter the common information for the following students in the form below, and then click "Continue" at the bottom.
Students (Group Service): Judith Caballero, Emma Sias, Steve Williams

Encounter Attendance

Provider: Margaret Sweeney

Date of Service and Start Time: 09/16/2013 9 AM (hh:mm)

End Time: 10 AM

Service Type * Adapted Physical Education

Language of Service: English

Session Type: Service Provided

Group Size: (Select)

Service Location: (Select)

* Be sure to enter these key fields.

Continue Cancel

Step	Action
14.	Click the Language of Service dropdown. The language of service will default to English, but you can select a different language from the dropdown.

English ▼

Step	Action
15.	Click the Session Type dropdown. 

Step	Action
16.	Click to select Service Provided . 

Record Services: Please enter the common information for the following students in the form below, and then click "Continue" at the bottom.
Students (Group Service): Judith Caballero, Emma Sias, Steve Williams

Encounter Attendance

Provider: Margaret Sweeney

Date of Service and Start Time: 09/16/2013 9 AM (hh:mm)

End Time: 10 AM

Service Type: Adapted Physical Education

Language of Service: English

Session Type: Service Provided

Group Size: (Select)

Service Location: (Select)

* Be sure to enter these key fields.

Continue Cancel

Step	Action
17.	Click to select Group from the Group Size dropdown.

Record Services: Please enter the common information for the following students in the form below, and then click "Continue" at the bottom.
Students (Group Service): Judith Caballero, Emma Sias, Steve Williams

Encounter Attendance

Provider: Margaret Sweeney

Date of Service and Start Time: 09/16/2013 9 AM (hh:mm)

End Time: 10 AM

Service Type: Adapted Physical Education

Language of Service: English

Session Type: Service Provided

Group Size: Group *Please specify a value: (Select)

Service Location: (Select)

* Be sure to enter these key fields.

Continue Cancel

Step	Action
18.	Click to select a group size of 3 . When recording a service for students who were present at the session, you must record the actual number of students in the session. For group sessions where only one student was present, indicate the Group Size as "Group" and select a value "1" from the associated dropdown menu.

Step	Action
19.	Click the Service Location dropdown. <div style="border: 1px solid black; padding: 2px; display: inline-block;">(Select) ▼</div>

Step	Action
20.	Click to select Gym . <div style="border: 1px solid black; padding: 2px; display: inline-block; background-color: #e1f5fe;">Gym</div>

Step	Action
21.	Click the Continue button. 

Step	Action
22.	Click the Progress Indicator dropdown. The Progress Indicator refers to the annual goals on the student's IEP.

Record Services:
 Select Record: Caballero, Judith (31033185) - 9/16/2013 # Records Saved: 0 of 3
 Complete the record below and click "Save" at the bottom.

Encounter Attendance

Student: Judith Caballero
 Student ID: 31033185
 Provider: Margaret Sweeney
 Date of Service and Start Time: 09/16/2013 09:00 AM (hh:mm)
 End Time: 10:00 AM
 Service Type: Adapted Physical Education
 Language of Service: English
 Session Type: Service Provided
 Duration: [blank]
 Group Size: Group *Please specify a value: 3
 Service Location: Gym
 Progress Indicator: (Select)
 Session Notes: (Select)

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.

Step	Action
23.	Click to select Student made partial progress toward goal attainment.

Record Services:
 Select Record: Caballero, Judith (31033185) - 9/16/2013 # Records Saved: 0 of 3
 Complete the record below and click "Save" at the bottom.

Encounter Attendance

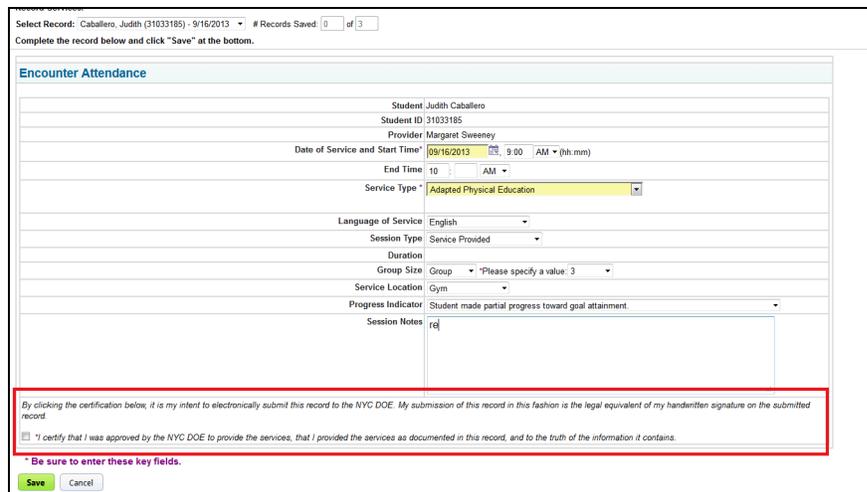
Student: Judith Caballero
 Student ID: 31033185
 Provider: Margaret Sweeney
 Date of Service and Start Time: 09/16/2013 09:00 AM (hh:mm)
 End Time: 10:00 AM
 Service Type: Adapted Physical Education
 Language of Service: English
 Session Type: Service Provided
 Duration: [blank]
 Group Size: Group *Please specify a value: 3
 Service Location: Gym
 Progress Indicator: Student made partial progress toward goal attainment
 Session Notes: Student made partial progress toward goal attainment

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.

Step	Action
24.	<p>You should type your session notes and certify the Service Record as soon as possible after you have delivered the service.</p> <p>Session Notes are required to complete a past service, with the following exceptions: ESL teachers, SETSS teachers, and Paraprofessionals. Additionally, you do not need to provide session notes for cancellations and absences. If you have further questions regarding Session Notes, please reach out to your supervisor.</p> <p>All providers with access to the same student can see the certified Session Notes associated with that student. Encounter attendance Service Records, including Session Notes, are permanent archives of the student’s file on SEGIS and are maintained indefinitely.</p> <p>If notes are stored elsewhere due to privacy concerns, Social Workers, Guidance Counselors, and Psychologists who provide counseling services should indicate in the Session Notes where their detailed notes on the session are located.</p>



Step	Action
25.	<p>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.</p> <p>All services must be completed and certified prior to the 15th of the month following the service.</p>

Select Record: Caballero, Judith (31033185) - 9/16/2013 # Records Saved: 0 of 3

Complete the record below and click "Save" at the bottom.

Encounter Attendance

Student: Judith Caballero
 Student ID: 31033185
 Provider: Margaret Sweeney
 Date of Service and Start Time: 09/16/2013 09:00 AM (hh:mm)
 End Time: 10:00 AM
 Service Type: Adapted Physical Education
 Language of Service: English
 Session Type: Service Provided
 Duration: Group *Please specify a value: 3
 Service Location: Gym
 Progress Indicator: Student made partial progress toward goal attainment.
 Session Notes: re

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.

Step	Action
26.	Click the checkbox to certify this service. <input type="checkbox"/>

Select Record: Caballero, Judith (31033185) - 9/16/2013 # Records Saved: 0 of 3

Complete the record below and click "Save" at the bottom.

Encounter Attendance

Student: Judith Caballero
 Student ID: 31033185
 Provider: Margaret Sweeney
 Date of Service and Start Time: 09/16/2013 09:00 AM (hh:mm)
 End Time: 10:00 AM
 Service Type: Adapted Physical Education
 Language of Service: English
 Session Type: Service Provided
 Duration: Group *Please specify a value: 3
 Service Location: Gym
 Progress Indicator: Student made partial progress toward goal attainment.
 Session Notes: record session notes here

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.

Step	Action
27.	Click the Save button. <input type="button" value="Save"/>

Step	Action
28.	The service has been saved. Next to the student's name it is indicated as "Saved" and 1 out of 3 records have been saved.

Step	Action
29.	Click the Select Record dropdown to certify another service. Click to select Sias, Emma.

Record Services:
Select Record: Sias, Emma (31004318) - 9/16/2013 # Records Saved: 1 of 3

Encounter Attendance

Student: Emma Sias
Student ID: 31004318
Provider: Margaret Sweeney
Date of Service and Start Time: 09/16/2013 09:00 AM (hh:mm)
End Time: 10:00 AM
Service Type: Adapted Physical Education
Language of Service: English
Session Type: Service Provided
Duration: [blank]
Group Size: Group *Please specify a value: 3
Service Location: Gym
Progress Indicator: (Select)
Session Notes: [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.

Step	Action
30.	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.

Record Services:
Select Record: Sias, Emma (31004318) - 9/16/2013 # Records Saved: 1 of 3

Encounter Attendance

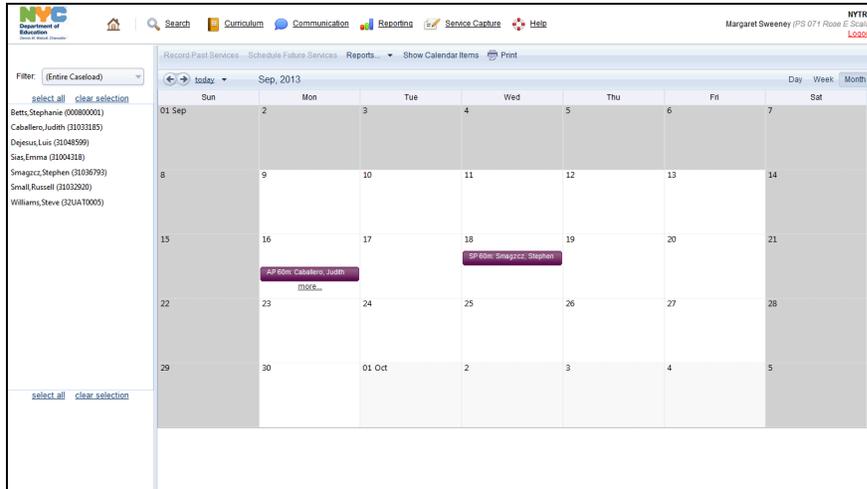
Student: Emma Sias
Student ID: 31004318
Provider: Margaret Sweeney
Date of Service and Start Time: 09/16/2013 09:00 AM (hh:mm)
End Time: 10:00 AM
Service Type: Adapted Physical Education
Language of Service: English
Session Type: Service Provided
Duration: [blank]
Group Size: Group *Please specify a value: 3
Service Location: Gym
Progress Indicator: (Select)
Session Notes: [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.

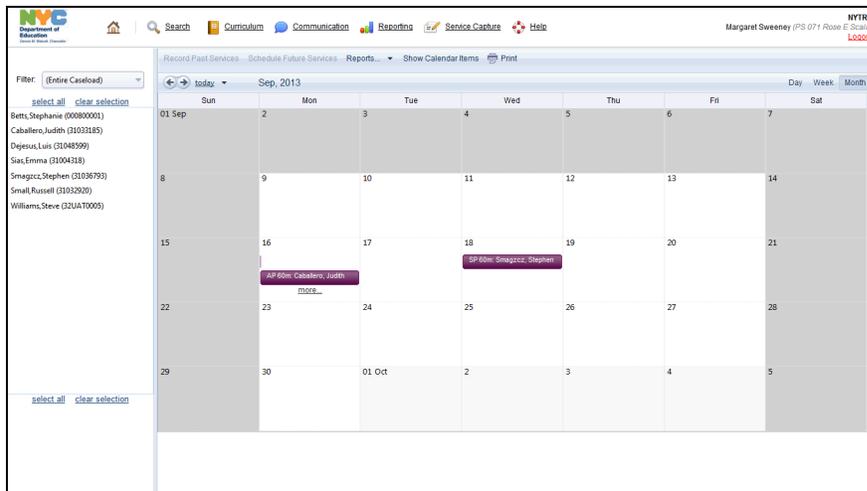
I certify that I was approved by the NYC DOE to provide the services, that I provided the services as documented in this record, and to the truth of the information it contains.

<https://segisdev.apps1.nyc.gov/servicescalendar.aspx?target=...>

Step	Action
31.	Click the Service Calendar link to view these records on the calendar.. Service Calendar



Step	Action
32.	The services now appear on the Service Capture calendar.



Step	Action
33.	Double-click to view the service details. AP 60m: Caballero, Judith

The screenshot shows the 'Service Record' page in SEGIS. The 'Encounter Attendance' section displays the following details:

- Student: Judith Caballero
- Student ID: 31033185
- Provider: Margaret Sweeney
- Date of Service and Start Time: 09/16/2013, 09:00 AM
- End Time: 10:00 AM
- Service Type: Adapted Physical Education
- Language of Service: English
- Session Type: Service Provided
- Duration: 60 minutes
- Group Size: Group 3
- Service Location: Gym
- Progress Indicator: Student made partial progress toward goal attainment.
- Session Notes: jk

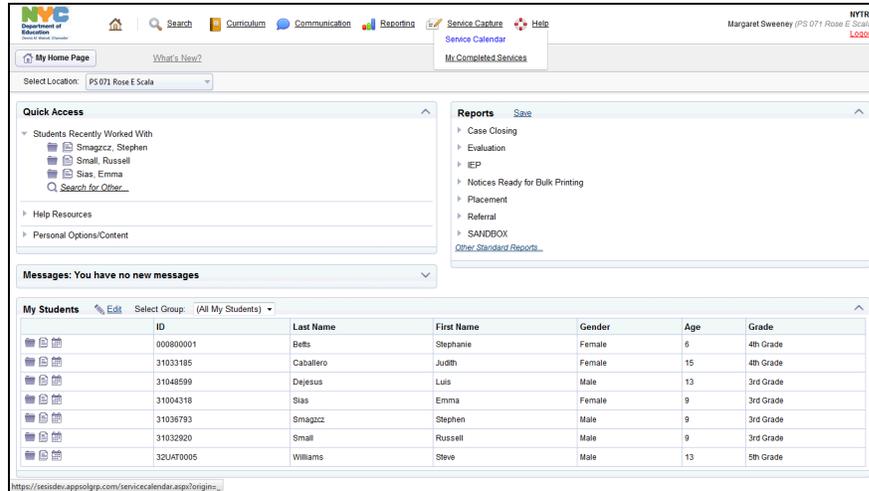
At the bottom, there is a certification statement: "By clicking the certification below, it is my intent to electronically submit this record to the NYC DOE. My submission of this record in this fashion is the legal equivalent of my handwritten signature on the submitted record." Below this is a checked checkbox: "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."

Step	Action
34.	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 SEGIS.

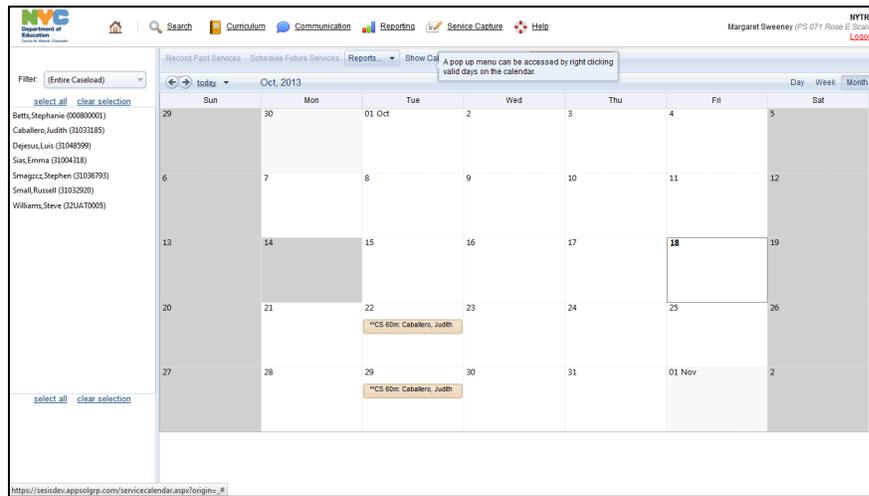
This screenshot is identical to the one above, showing the 'Service Record' page with the same 'Encounter Attendance' details for Student Judith Caballero.

Step	Action
35.	This concludes the lesson on recording/scheduling group services. End of Procedure.

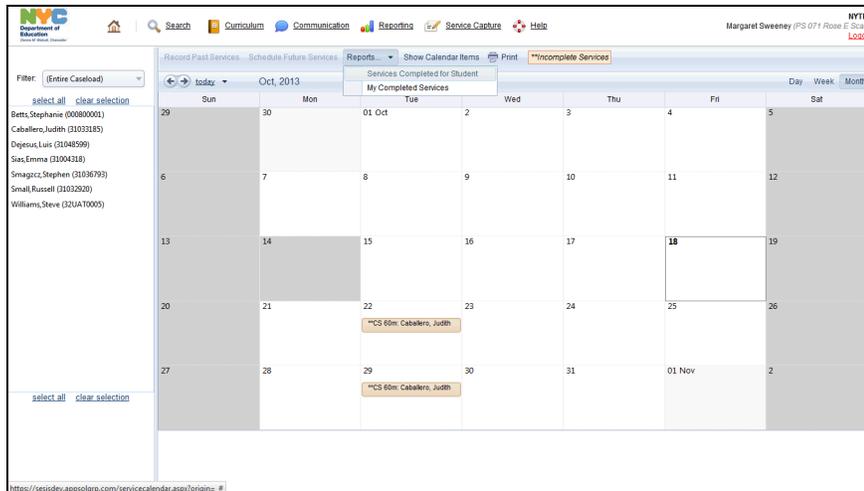
Reviewing Encounter Attendance Reports Procedure



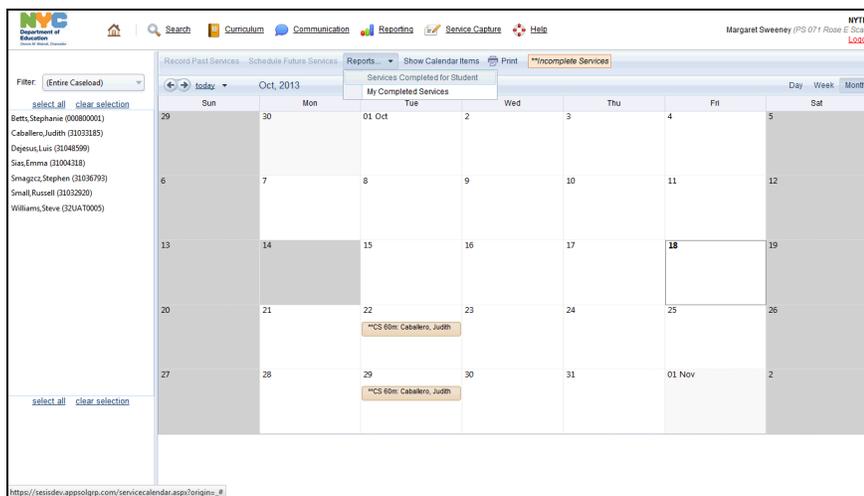
Step	Action
1.	Click the Service Calendar link from your homepage. Service Calendar



Step	Action
2.	Click the Reports link. Reports...



Step	Action
3.	There are two types of Encounter Attendance reports that you can view directly from the Service Capture calendar.



Step	Action
4.	Click to view the Services Completed for Student report.

Services Completed for Student

Services Completed for Student: Caballero, Judith (31033185)

Service: (all services) Provided by You Only

Month: September, 2013

September 2013 Services (as of 10/18/2013)							Totals
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Completed
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16 AP 60m AP 60m	17	18	19	20	21	AP (120)
22	23	24	25	26	27	28	
29	30	1	2	3	4	5	
Totals in October:							AP (120m)

Step	Action
5.	This report shows a monthly summary of all the recorded services for a particular student. Encounter Attendance Service Records, including Session Notes, are permanent archives of the student's file on SEGIS and are maintained indefinitely.

Services Completed for Student: Caballero, Judith (31033185)

Service: (all services) Provided by You Only

Month: September, 2013

September 2013 Services (as of 10/18/2013)							Totals
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Completed
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16 AP 60m AP 60m	17	18	19	20	21	AP (120)
22	23	24	25	26	27	28	
29	30	1	2	3	4	5	
Totals in October:							AP (120m)

Step	Action
6.	Click the Services Completed for Student: dropdown. Click the object. <input type="text" value="Caballero, Judith (31033185)"/>

Services Completed for Student: Judith Caballero (31033185)

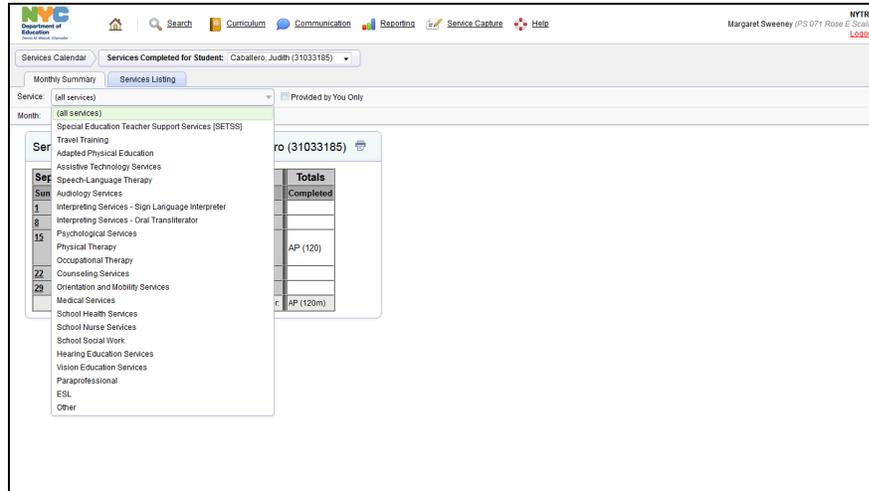
September 2013 Services (as of 10/21/2013)							Totals
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Completed
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16 AP 50m AP 50m	17	18	19	20	21	AP (120)
22	23	24	25	26	27	28	
29	30	1	2	3	4	5	
Totals in October:							AP (120m)

Step	Action
7.	Click the Services Completed for Student: list. <input type="text" value="Caballero, Judith (31033185)"/>

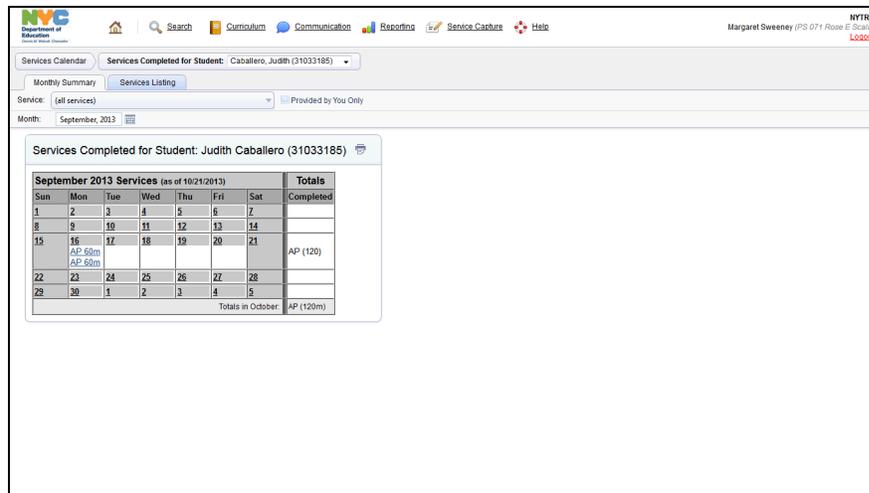
Services Completed for Student: Judith Caballero (31033185)

September 2013 Services (as of 10/21/2013)							Totals
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Completed
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16 AP 50m AP 50m	17	18	19	20	21	AP (120)
22	23	24	25	26	27	28	
29	30	1	2	3	4	5	
Totals in October:							AP (120m)

Step	Action
8.	Click this dropdown to view the monthly summary of other students. <input type="text" value="Caballero, Judith (31033185)"/>



Step	Action
9.	Click this dropdown to select specific service types.



Step	Action
10.	Clicking on a recorded service from the monthly summary will show more details of this service. Click the AP 60m link. AP 60m

Service	Date/Time	Minutes	Student	Staff	Session Type	Session Notes	Is Wheelchair	Is Community Work	Is Adaptive Equip	Is Self Care	Is Sensory	Service Location	Is SPLang Reev	Is SPAugment Reev	Is SPArticulation	Is SPPhonology	Is SPPhonemic	Is SPVo
AP	09/16/2013 Mon, 09:00 AM	60	Caballero, Judith	Sweeney/Margaret	Direct Service	record session notes here	No	No	No	No	No	Gym	No	No	No	No	No	No
AP	09/16/2013 Mon, 09:00 AM	60	Caballero, Judith	Sweeney/Margaret	Direct Service	jk	No	No	No	No	No	Gym	No	No	No	No	No	No

Step	Action
11.	This is the Services Listing view of the report, which provides more detail on the selected service.

Step	Action
12.	<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>Monthly Summary</p>

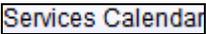
Services Completed for Student: Judith Caballero (31033185)

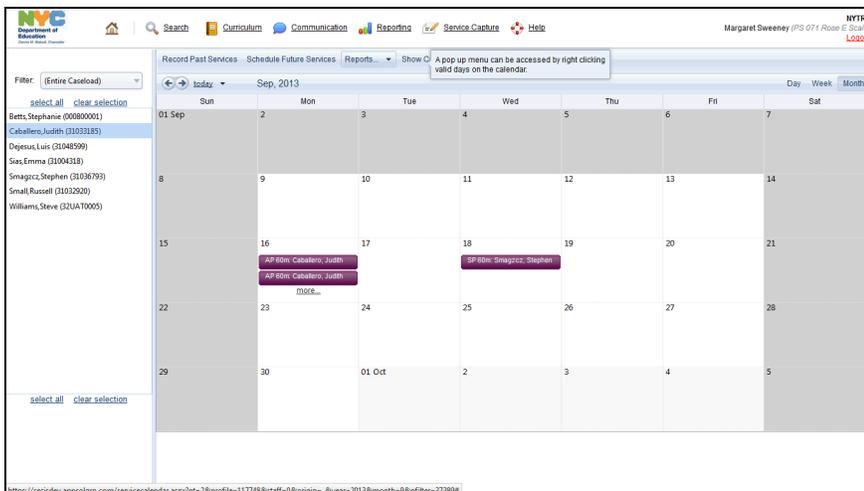
September 2013 Services (as of 10/21/2013)							Totals
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Completed
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16 AP 60m AP 60m	17	18	19	20	21	AP (120)
22	23	24	25	26	27	28	
29	30	1	2	3	4	5	
Totals in September:							AP (120m)

Step	Action
13.	<p>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.</p> <p>Click the Provided by You Only option.</p> 

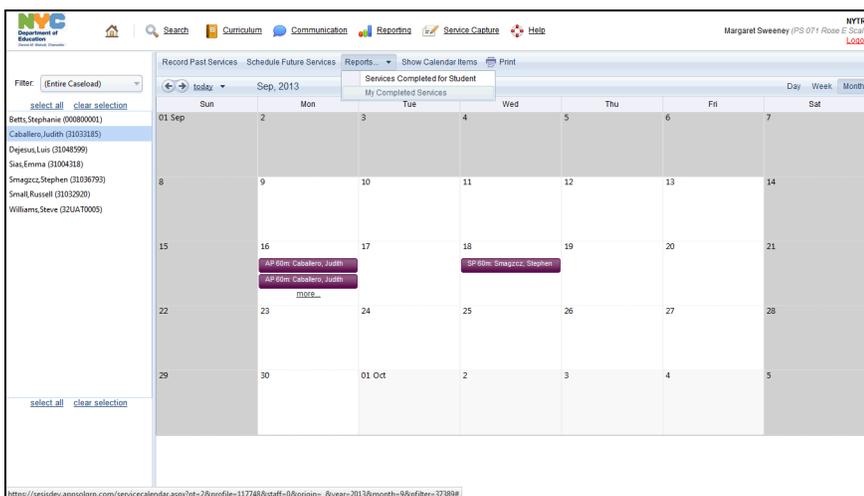
Services Completed for Student: Judith Caballero (31033185)

September 2013 Services (as of 10/21/2013)							Totals
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Completed
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16 AP 60m AP 60m	17	18	19	20	21	AP (120)
22	23	24	25	26	27	28	
29	30	1	2	3	4	5	
Totals in September:							AP (120m)

Step	Action
14.	<p>Click to return to the Services Calendar.</p> 



Step	Action
15.	Click the Reports link. 



Step	Action
16.	Click to view the My Completed Services report. 

Services Completed by Margaret Sweeney

Student Name (ID)	September 2013																															
	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	T	
Caballero, Judith (31033185)																																
Smagorz, Stephen (31036793)																																

AP = Adapted Physical Education, SP = Speech-Language Therapy

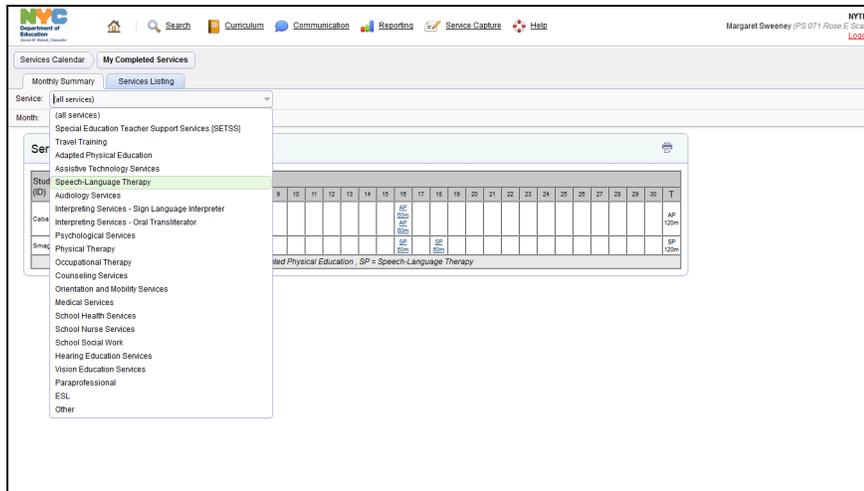
Step	Action
17.	This report shows a monthly summary of all services you have provided and recorded.

Services Completed by Margaret Sweeney

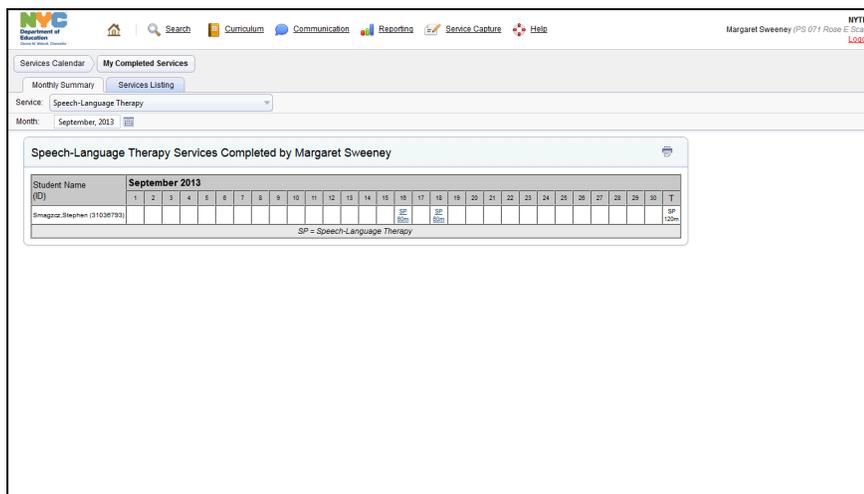
Student Name (ID)	September 2013																															
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	T	
Caballero, Judith (31033185)																																
Smagorz, Stephen (31036793)																																

AP = Adapted Physical Education, SP = Speech-Language Therapy

Step	Action
18.	Click the Select dropdown.



Step	Action
19.	<p>You can select a specific type of service to filter the report and only view that service.</p> <p>Click to select Speech-Language Therapy.</p>



Step	Action
20.	<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>

Month: September, 2013 Set Specific Date Range...

Services Completed by Margaret Sweeney

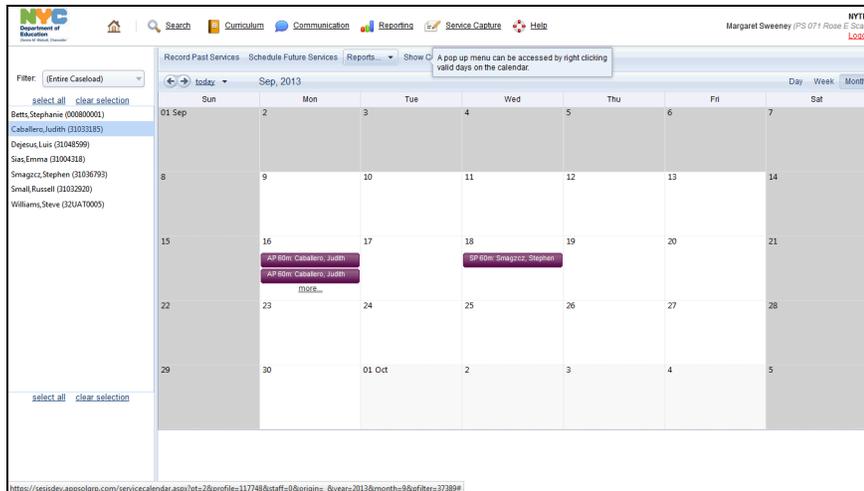
Service	Date/Time	Minutes	Student	Session Type	Session Notes	Is Wheelchair	Is Community Work	Is Adaptive Equip	Is Self Care	Is Sensory	Service Location	Is SPLang Reev	Is SPAugment Reev	Is SPArticulation	Is SPPhonology	Is SPPhonic	Is SPVoice	Is SPFluenc
September 2013 Services (as of 10/21/2013)																		
SP	09/18/2013 Wed, 09:30 AM	60	Smagrcz, Stephen	Direct Service	j	No	No	No	No	No	Therapy Room	No	No	No	No	No	Yes	Yes
SP	09/16/2013 Mon, 09:30 AM	60	Smagrcz, Stephen	Direct Service	record session notes here	No	No	No	No	No	Therapy Room	No	No	No	No	No	Yes	Yes
AP	09/16/2013 Mon, 09:00 AM	60	Caballero, Judith	Direct Service	record session notes here	No	No	No	No	No	Gym	No	No	No	No	No	No	No
AP	09/16/2013 Mon, 09:00 AM	60	Caballero, Judith	Direct Service	jk	No	No	No	No	No	Gym	No	No	No	No	No	No	No

Step	Action
21.	This is the Services Listing view of the report, which provides more detail on the selected service.

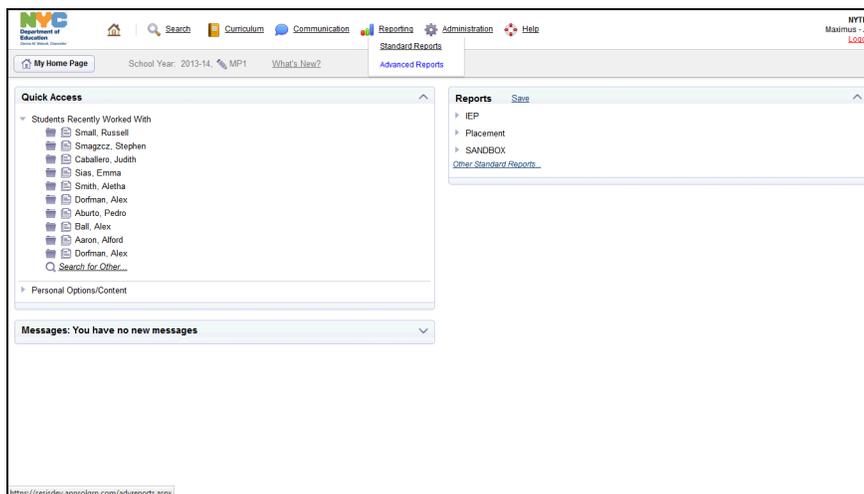
Services Completed by Margaret Sweeney

Service	Date/Time	Minutes	Student	Session Type	Session Notes	Is Wheelchair	Is Community Work	Is Adaptive Equip	Is Self Care	Is Sensory	Service Location	Is SPLang Reev	Is SPAugment Reev	Is SPArticulation	Is SPPhonology	Is SPPhonic	Is SPVoice	Is SPFluenc
September 2013 Services (as of 10/21/2013)																		
SP	09/18/2013 Wed, 09:30 AM	60	Smagrcz, Stephen	Direct Service	j	No	No	No	No	No	Therapy Room	No	No	No	No	No	Yes	Yes
SP	09/16/2013 Mon, 09:30 AM	60	Smagrcz, Stephen	Direct Service	record session notes here	No	No	No	No	No	Therapy Room	No	No	No	No	No	Yes	Yes
AP	09/16/2013 Mon, 09:00 AM	60	Caballero, Judith	Direct Service	record session notes here	No	No	No	No	No	Gym	No	No	No	No	No	No	No

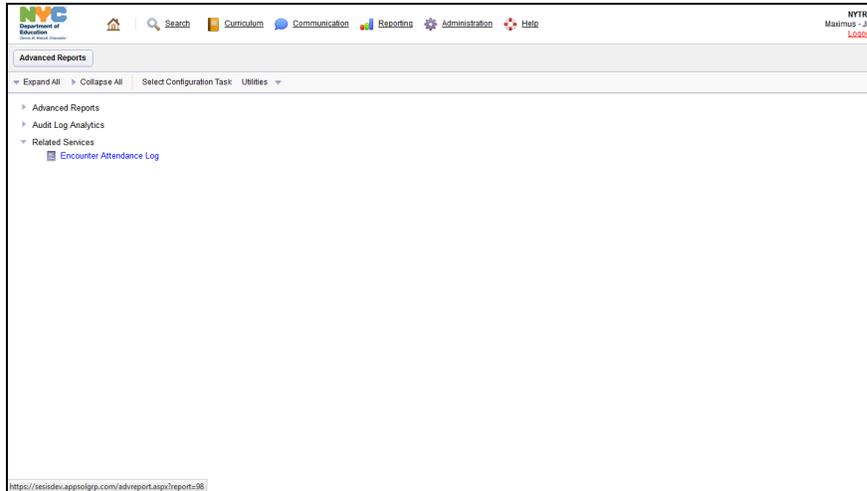
Step	Action
22.	We still have to option to view another student or another service type. Click to return to the Services Calendar . Services Calendar



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



Step	Action
25.	Click to open the Encounter Attendance Log report. Encounter Attendance Log

Month: September, 2013 Set Specific Date Range...

Services Completed by Margaret Sweeney

Service	Date/Time	Minutes	Student	Session Type	Session Notes	Is Wheelchair	Is Community Work	Is Adaptive Equip	Is Self Care	Is Sensory	Service Location	Is SPL Lang Reev	Is SPL Augment Reev	Is SP Articulation	Is SP Phonology	Is SP Phonic	Is SP Voice	Is SP Fluency
September 2013 Services (as of 10/21/2013)																		
SP	09/18/2013 Wed, 09:30 AM	60	Smagrcz, Stephen	Direct Service		No	No	No	No	No	Therapy Room	No	No	No	No	No	Yes	Yes
SP	09/16/2013 Mon, 09:30 AM	60	Smagrcz, Stephen	Direct Service	record session notes here	No	No	No	No	No	Therapy Room	No	No	No	No	No	Yes	Yes
AP	09/16/2013 Mon, 09:00 AM	60	Caballero, Judith	Direct Service	record session notes here	No	No	No	No	No	Gym	No	No	No	No	No	No	No
AP	09/16/2013 Mon, 09:00 AM	60	Caballero, Judith	Direct Service		No	No	No	No	No	Gym	No	No	No	No	No	No	No

Step	Action
26.	This concludes the lesson on reviewing encounter attendance reports. End of Procedure.

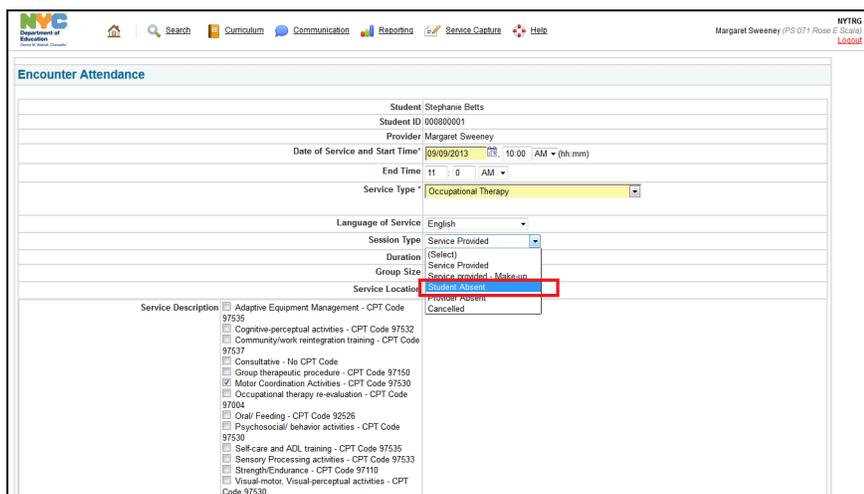
Recording Absences and Cancellations

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

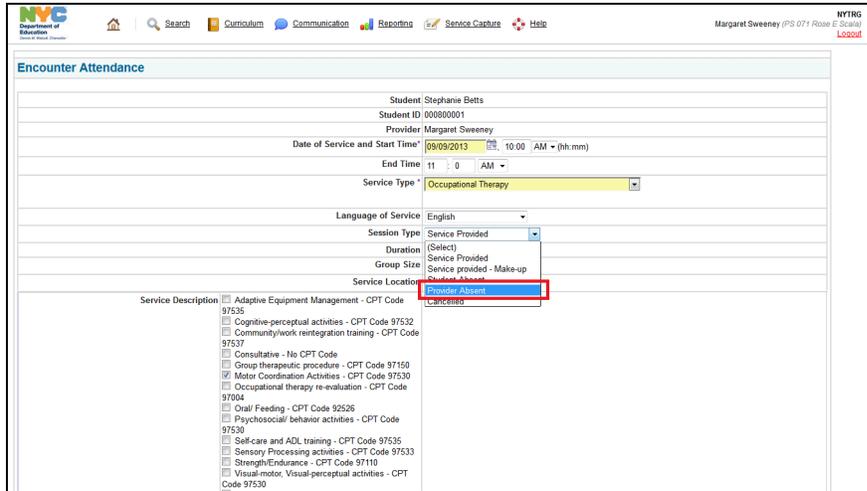
- A “Provider Absence” should be recorded when a session was scheduled but the provider was absent from the DOE. Examples of this would be when a provider takes personal leave time or calls in sick.
- A session should be recorded as cancelled when the session is not held due to reasons other than student or provider absences as described above. Examples of cancelled sessions would include, but are not limited to: school closings (e.g. holidays, snow days, etc.), the provider is attending an IEP or other meeting, DOE-approved training or asked to perform another task, or if the student is in school but is unavailable (e.g. school assembly, testing, school trip, etc.)

Procedure

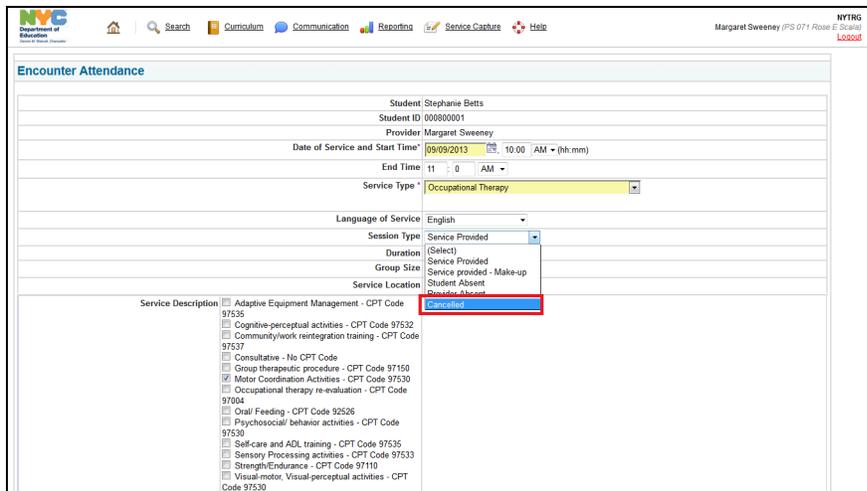
This lesson will guide you through recording absences and cancellations.



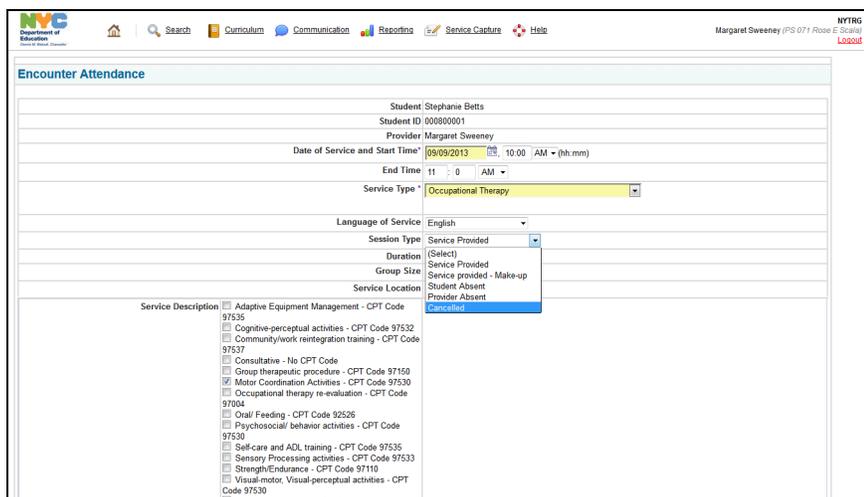
Step	Action
1.	<p>To record a student absence:</p> <p>When completing the Service Record, select the Session Type “Student Absent”. You should record the planned duration of the session in the Start Time and End Time fields. For students absent from a group session, you will enter the group size as indicated on the IEP and the time the session was held for the rest of the group.</p> <p>You don’t have to record Service Location, Group Size, Service Description, Progress Indicator and Session Notes when recording an absence; however, it is best practice to document in Session Notes why the student was not available, if known. You must certify all absences.</p>



Step	Action
2.	<p>To record a provider absence:</p> <p>When completing the Service Record, select the Session Type “Provider Absent”. You should record the planned duration of the session in the Start Time and End Time fields. For providers absent from a group session, you will enter the group size as indicated on the IEP and the time you planned to hold the session.</p> <p>You don’t have to record Service Location, Group Size, Service Description, Progress Indicator and Session Notes when recording an absence; however, it is best practice to document the reason for the absence in Session Notes. You must certify all absences.</p>



Step	Action
3.	<p>To record a cancelled session:</p> <p>When completing the Service Record, select the Session Type “Cancelled”. You should record the planned duration of the session in the Start Time and End Time fields. For cancelled group sessions, you will enter the group size as indicated on the IEP and the time you planned to hold the session.</p> <p>You don’t have to record Service Location, Group Size, Service Description, Progress Indicator and Session Notes; however, it is best practice to document the reason for the cancellation in Session Notes. You must certify all absences.</p>

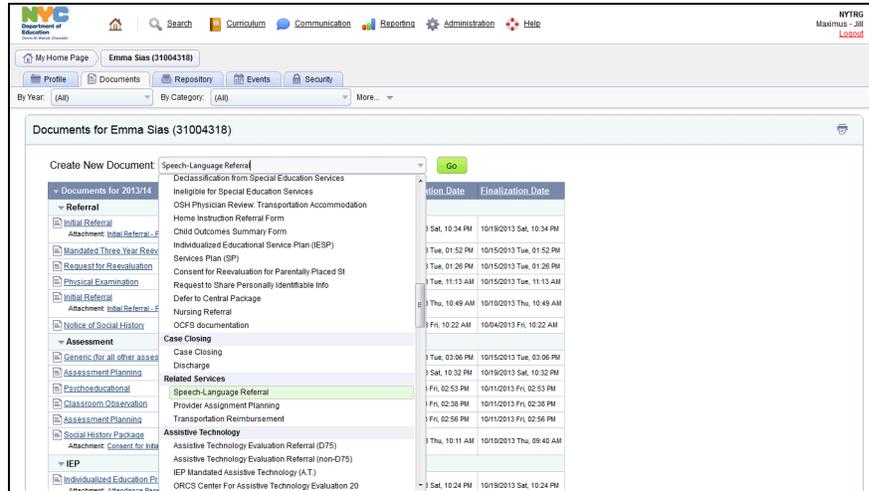


Step	Action
4.	<p>This concludes the lesson on recording absences and cancellations.</p> <p>End of Procedure.</p>

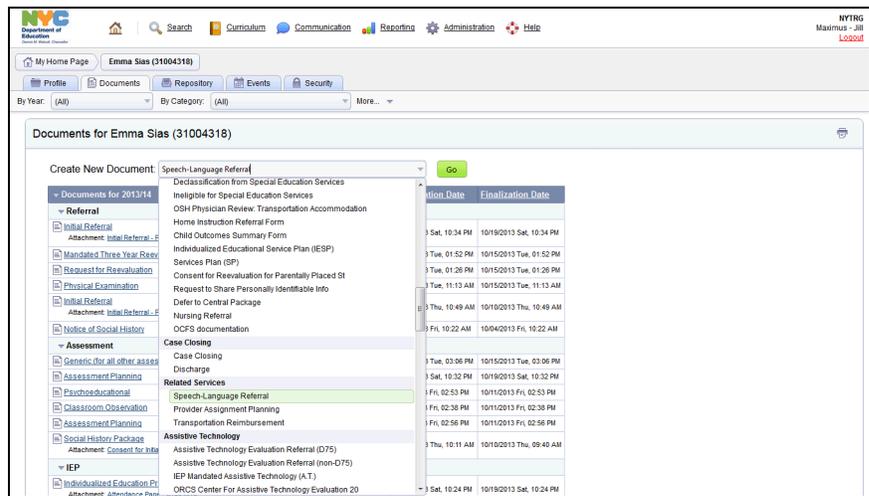
Completing a Speech-Language Referral

Procedure

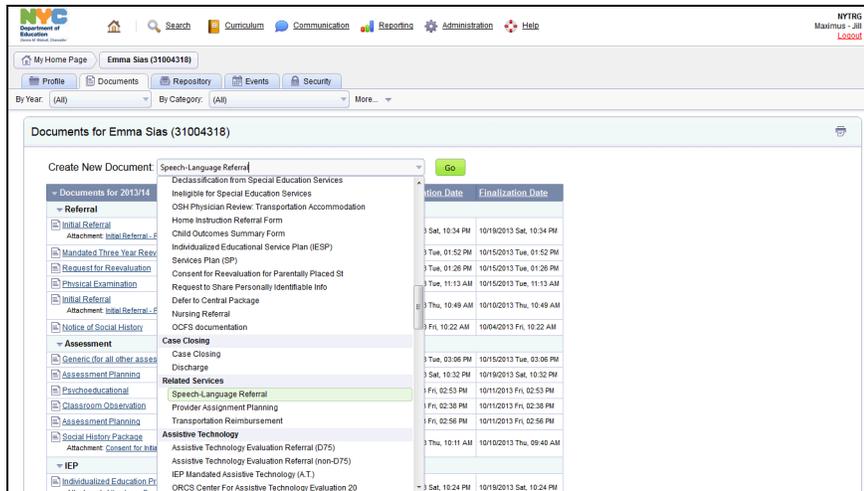
This lesson will guide you through the process of completing a Speech-Language Referral.



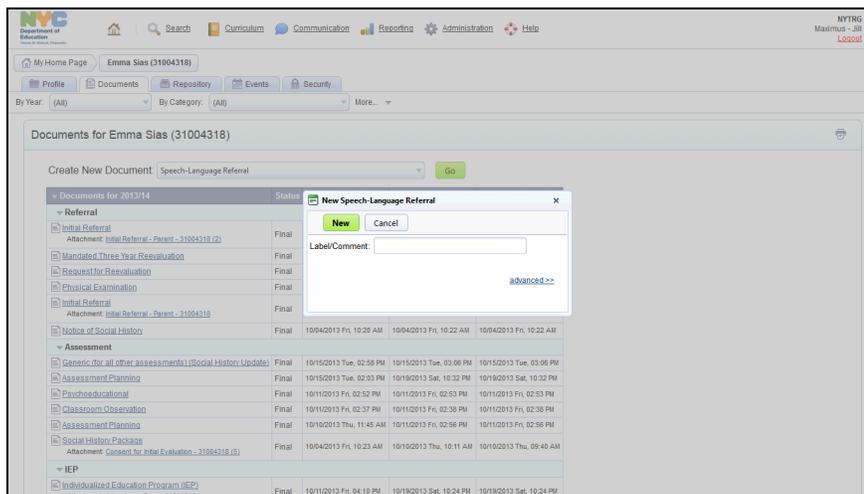
Step	Action
1.	Each student receiving Speech-Language Therapy services must have one Speech-Language Referral completed each calendar year.



Step	Action
2.	Click to create the Speech-Language Referral document.

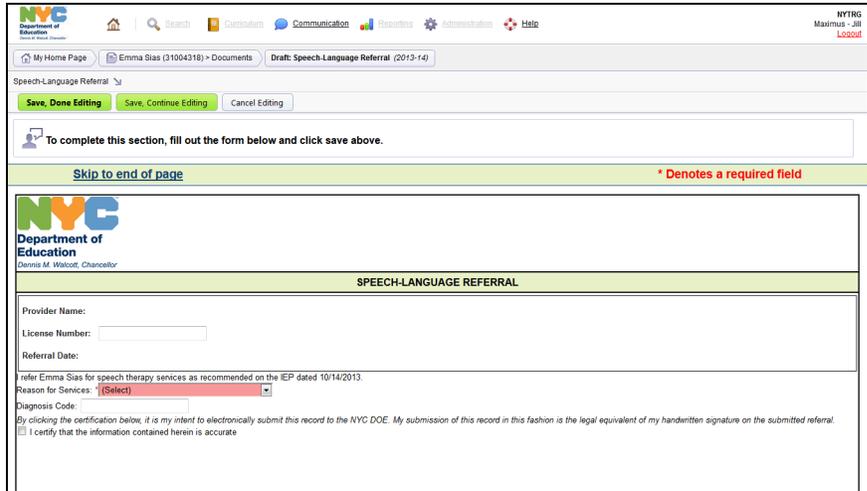


Step	Action
3.	Click the Go button.

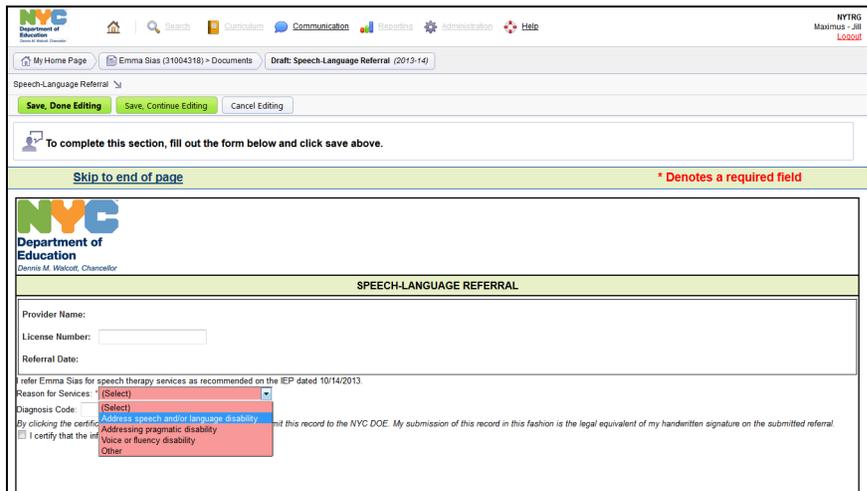


Step	Action
4.	Click the New button.





Step	Action
5.	Click the Reason for Services dropdown. 



Step	Action
6.	Click to select the appropriate reason for services. For this example, select: Address speech and/or language disability . Click the object. 

Editing Section: Speech-Language Referral - Draft: Speech-Language Referral for Emma Sias (31004318)

Save, Done Editing Save, Continue Editing Cancel Editing

Skip to end of page * Denotes a required field

NYC
Department of Education
Dennis M. Walcott, Chancellor

SPEECH-LANGUAGE REFERRAL

Provider Name:
License Number:
Referral Date:

I refer Emma Sias for speech therapy services as recommended on the IEP dated 10/14/2013.
Reason for Services:

Diagnosis Code:

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 referral.

I certify that the information contained herein is accurate

Step	Action
7.	Enter the corresponding diagnosis code.

Editing Section: Speech-Language Referral - Draft: Speech-Language Referral for Emma Sias (31004318)

Save, Done Editing Save, Continue Editing Cancel Editing

Skip to end of page * Denotes a required field

NYC
Department of Education
Dennis M. Walcott, Chancellor

SPEECH-LANGUAGE REFERRAL

Provider Name:
License Number:
Referral Date:

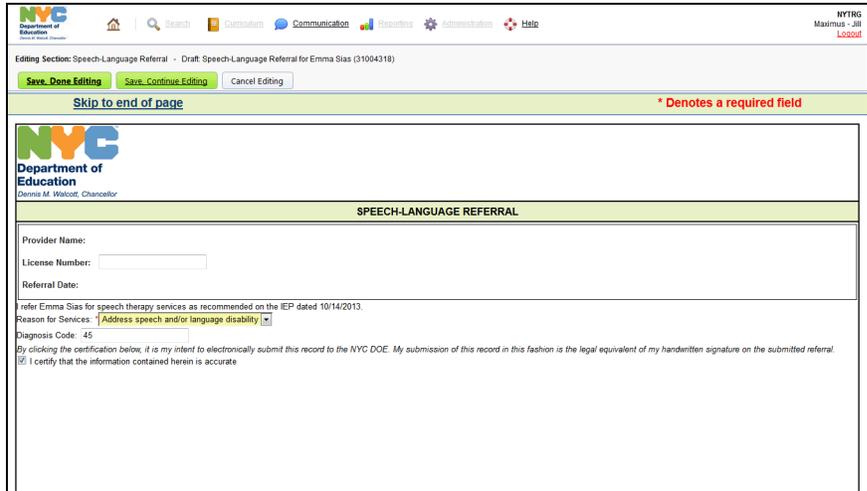
I refer Emma Sias for speech therapy services as recommended on the IEP dated 10/14/2013.
Reason for Services:

Diagnosis Code:

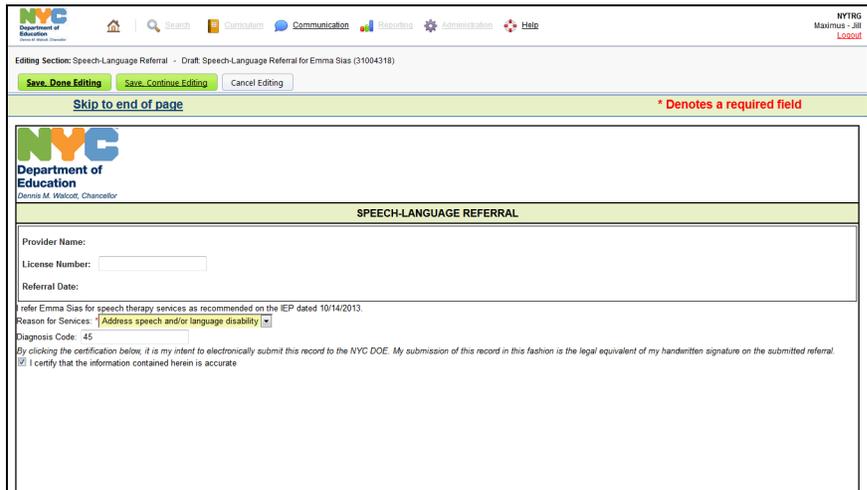
By clicking the certification below, it is my intent to electronically submit this record to the NYC DOE. My submission of this record in this fashion is the legal equivalent of my handwritten signature on the submitted referral.

I certify that the information contained herein is accurate

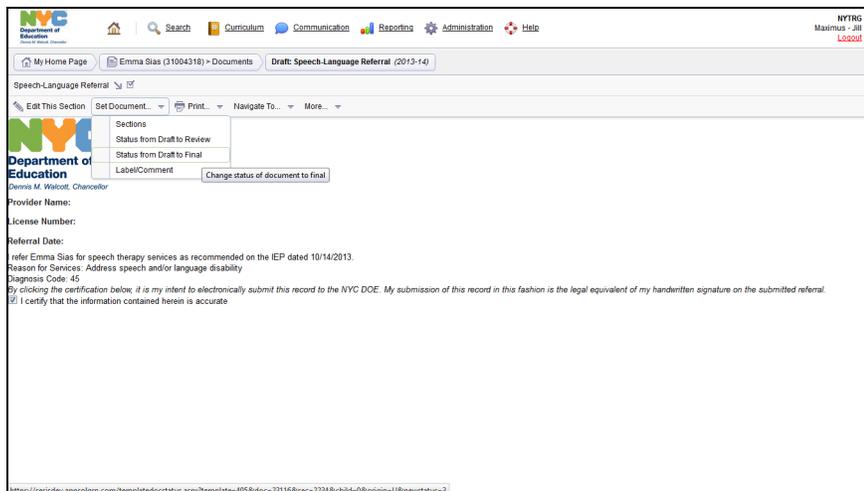
Step	Action
8.	Note: By clicking the certification statement below you are electronically submitting this record to the NYC DOE. This submission is the legal equivalent of your handwritten signature on a submitted referral.

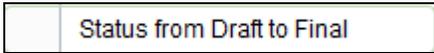


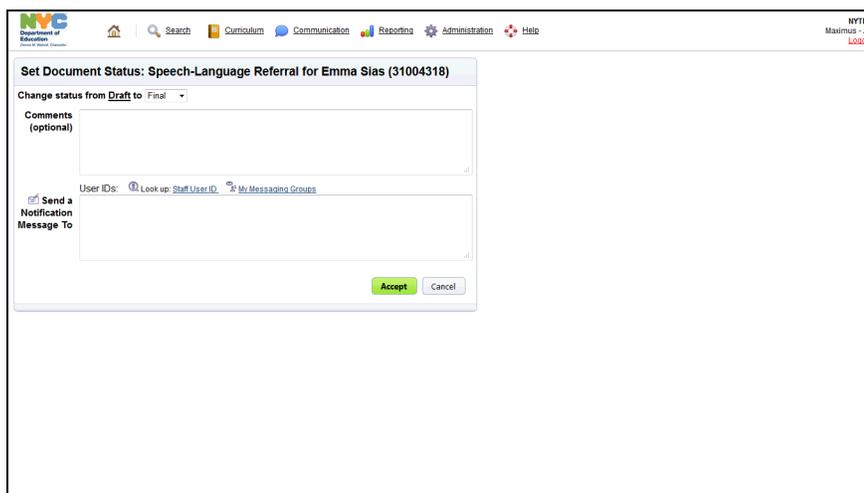
Step	Action
9.	Click the checkbox next to the statement: I certify that the information contained herein is accurate. <input checked="" type="checkbox"/>



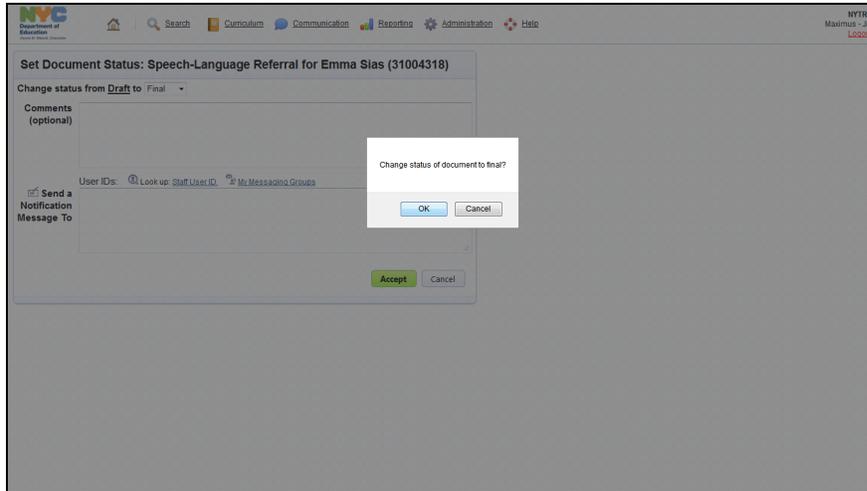
Step	Action
10.	Click the Save, Done Editing button. 

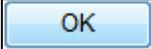


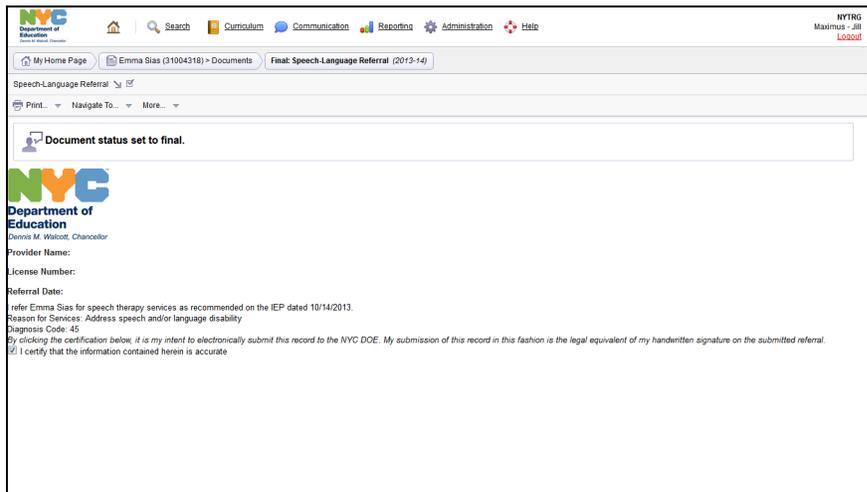
Step	Action
11.	Click the Set Document.... Status from Draft to Final link. 



Step	Action
12.	Click the Accept button. 



Step	Action
13.	Click the OK button. 



Step	Action
14.	This concludes the lesson on completing a Speech-Language Referral. End of Procedure.