Completing Encounter Attendance Service Records Created Before February 28

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Introduction

On February 28, SESIS was updated to include enhancements to the Encounter Attendance Service Record screen and related reports. This training guide provides guidance on how to proceed when an Encounter Attendance Service Record was created before February 28.

Note: Use the table below for quick reference on what actions are available for Encounter Attendance Service Records created before February 28. Refer to the remainder of the training guide for detailed instruction.

<table>
<thead>
<tr>
<th>Actions for Encounter Attendance Service Records Created Before February 28</th>
<th>View Existing Service Record</th>
<th>Copy Session Notes*</th>
<th>Link Mandate to Service Record</th>
<th>Edit and Save Service Record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Past service records certified before February 28</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Saved service records that were not certified before February 28.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Pre-scheduled future service records created before February 28</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Note: *This is a one-time exception to prevent the loss of session notes entered before February 28. Otherwise, you must not copy session notes from the Encounter Attendance service records.

View Past Service Records Certified before February 28

Encounter Attendance service (purple-colored) records certified before February 28 are unchanged. Double click, or right click on the record to view the details.
Edit saved service records, not certified before February 28

To edit a service record saved and not certified before February 28 and prevent losing previously entered session notes, copy the session notes before linking the service record to a mandate. Once you edit the service record and link it to a mandate, the previously saved data (entered before February 28) will be erased (except Date of Service and Service Type) and replaced with the selected mandate details.

For more information, refer to the What’s New in Encounter Attendance, Completing an Encounter Attendance Service Record, and Understanding the Mandate Short Description guides on the SESIS InfoHub.

Follow these steps to edit a service record saved and not certified before February 28.

1. From the Service Calendar, double click on the orange-colored service record for the student.
2. Copy the session notes from the Session Notes field (if applicable).

**Note:** The following message is displayed “Warning: Make a copy of Session Notes before editing.”

3. Click Edit.
Note: Once the service record is in edit mode, you will have another opportunity to copy the session notes if you did not copy the session notes before clicking Edit. Copy the session notes before clicking the lookup link (step 4) to prevent losing data entered before February 28. As a reminder, the following message is displayed “Warning: Make a copy of Session Notes before selecting mandate from Lookup link.”

Notice that the Mandated Service (IEP/IESP/SP/CSP) box is checked before selecting a mandate from the lookup link. If previously entered, the “old” service record data is prepopulated in the service record (i.e., Date of Service, Start Time, End Time, Service Type, Session Type, Mandated Max. Group Size: Actual, Mandated Service Location: Actual, CPT Code/Service Type Detail, Progress Indicator, and Notes for this Session).

The following message is displayed underneath the Mandate Short Description: “Click the Lookup link to select a mandate for this service record.”

4. Click the lookup link to select a mandate.
5. Click the appropriate mandate from the Select Mandate pop-up window to populate the service record.

**Note:** For more information, please refer to the Understanding the Mandate Short Description guide on the SESIS InfoHub.

<table>
<thead>
<tr>
<th>Mandate Short Description</th>
<th>Mandate Term</th>
<th>Service Type</th>
<th>Mandated Language of Service</th>
<th>Mandated Frequency</th>
<th>Mandated Duration</th>
<th>Mandated Max. Group Size</th>
<th>Mandated Service Location</th>
<th>Mandate Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>S:IEP:SP:2W:30:4:EN:10M:3</td>
<td>10M</td>
<td>Speech-Language Therapy</td>
<td>English</td>
<td>2/week</td>
<td>30 Minutes</td>
<td>Group of 4</td>
<td>Separate Location Therapy Room</td>
<td>11/12/2021</td>
</tr>
<tr>
<td>S:IEP:SP:1W:30:1:EN:10M:2</td>
<td>10M</td>
<td>Speech-Language Therapy</td>
<td>English</td>
<td>1/week</td>
<td>30 Minutes</td>
<td>Individual</td>
<td>Separate Location Therapy Room</td>
<td>11/12/2021</td>
</tr>
</tbody>
</table>

6. Verify/Edit the **Date of Service** and **Service Type**.

7. Enter the **Start Time** and **End Time**.

**Note:** The Mandate Short Description is updated with the selected mandate.
8. Verify/Edit the **Session Type** and **Claimed Frequency**.

**Note:** Claimed Frequency is the portion of the mandate assigned to the caseload of the provider entering the service record. A provider's caseload may, if necessary, include less than the full mandated frequency for a mandate due to limited schedule capacity. In these instances, a second provider may be assigned the balance of the mandate, resulting in it being fully served. The full IEP Mandated Frequency will prepopulate on the service record. If the provider is servicing the entire mandated frequency, the value does not need to change on the Claimed Frequency field. On the other hand, if the provider is servicing a part of the mandated frequency, the provider must select the partial frequency from the Claimed Frequency dropdown menu. The claimed frequency does not impact the ability of other providers to record student encounters.

![Image showing the Session Type and Claimed Frequency fields](image_url)

**Note:** Notice after selecting the mandate, the mandate is populated in the Mandate Short Description field, and the data from the “old” service record is erased, and the following fields are updated from the student’s IEP: Mandated Frequency, Claimed Frequency, Mandated Duration, Mandated Language of Service, Mandated Max. Group Size and Mandated Service Location.

9. Enter the **Mandated Max. Group Size**: Actual, **Mandated Service Location**: Actual, **CPT Code/Service Type Detail** (if applicable), and **Progress Indicator**.

![Image showing the Mandated Max. Group Size and Service Location fields](image_url)

10. Paste the previously copied session notes in the Notes for this Session field.

11. **Check the box** to certify the service. Certifying a Service Record is equivalent to attaching an electronic version of your signature. All services must be certified, including absences and cancellations.

12. Click **Save** to save your entries and certify the service record.
**Note:** After the service record is certified, the completed service record will display on the Service Calendar in purple. **Double click**, or **right click** on the record to view the details.

**Note:** Once a previously saved past service record is completed and saved (on or after February 28), the next service record edited or created, and linked to the same mandate, will prepopulate based on the last saved service record.

**Edit a pre-scheduled future service record created before February 28**

To edit pre-scheduled future service records (with a current future Date of Service) created before February 28, you must link the service record to a mandate. Once the service record is linked to a mandate, the previously saved data (entered before February 28) will be erased (except the Date of Service and Service Type) and replaced with the selected mandate details.

For more information, please refer to the What’s New in Encounter Attendance, Scheduling a Future Service for a Student, and Understanding the Mandate Short Description guides on the SESIS InfoHub.

Follow these steps to edit a pre-scheduled future service record created before February 28 (with a current future Date of Service).
1. From Service Calendar, click on the orange-colored service record for the student.

2. Click **Edit**.

**Encounter Attendance**

**Note:** Notice that the Mandated Service (IEP/IESP/SP/CSP) box is checked before selecting a mandate from the lookup link. If previously entered, some of the “old” service record data are prepopulated (i.e., Date of Service, Start Time, End Time, Service Type, Mandated Max. Group Size: Actual, Mandated Service Location: Actual, CPT Code/Service Type Detail, Progress Indicator, and Notes for this Session).

The following message is displayed underneath the Mandate Short Description: “**Click the Lookup link to select a mandate for this service record.**”
3. Click the **lookup** link to select a mandate.

![Image of the lookup link to select a mandate]

**Warning:** Make a copy of Session Notes before selecting mandate from Lookup link.

4. Click the appropriate mandate from the **Select Mandate pop-up window** to select it and populate the service record.

**Note:** For more information, refer to the [Understanding the Mandate Short Description](#) guide on the SESIS InfoHub.
5. Verify/Edit the **Date of Service** and **Service Type**.

6. Enter the **Start Time** and **End Time**, as appropriate.

**Note:** The Mandate Short Description is updated with the selected mandate.

**Note:** Notice after selecting the mandate, the mandate is populated in the Mandate Short Description field, the data from the “old” service record is erased, and the following fields are updated from the student’s IEP: Mandated Frequency, Claimed Frequency, Mandated Duration, Mandated Language of Service, Mandated Max. Group Size and Mandated Service Location.

Update the **Session Type**, **Mandated Max. Group Size: Actual** and **Mandated Service Location: Actual**, as appropriate.

7. Click **Save** the pre-scheduled future service.

**Note:** After the service record is saved, the incomplete service record will display on the Service
Calendar in orange. **Double click**, or **right click** on the record to view the details or edit the service record.

Once a previously saved pre-scheduled future service record is completed and saved (on or after February 28), the next service record edited or created, and linked to the same mandate, will prepopulate based on the last saved service record.

An alternative option is to delete the previously saved pre-scheduled future service record (i.e., entered before February 28) and create a new pre-scheduled future service record (on or after February 28) instead of editing the service record as detailed above.

**Private List Reports**

Private List Reports created from student service records are updated with column name changes and new data columns. You should edit the existing report to update the report filters and columns. An alternative option is to delete and recreate the report.