



# 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.s

**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.

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

**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 [SEIS 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**.

Encounter Attendance	
<b>Student:</b>	Andy Annual
<b>Student ID:</b>	ANNUAL044
<b>Provider:</b>	Bruce Speechdoe
<b>Date of Service and Start Time:</b>	02/07/2022, 11:00 AM
<b>End Time:</b>	11:30 AM
<b>Service Type:</b>	Speech-Language Therapy
<b>Language of Service:</b>	English
<b>Session Type:</b>	Service Provided
<b>Duration:</b>	30 minutes
<b>Grouping:</b>	Group of 4
<b>Service Location:</b>	Therapy Room
<b>Service Description:</b>	<input checked="" type="checkbox"/> Treatment of speech, language, voice, communication, and/or auditory processing in a group setting - CPT code 92508
<b>Progress Indicator:</b>	Student made expected progress toward goal attainment.
<b>Session Notes:</b>	The student session notes are entered 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.

**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.

The screenshot displays the 'Encounter Attendance' form for student Andy Annual. A red-bordered warning message at the top reads: "Warning: Make a copy of Session Notes before selecting mandate from Lookup link." The form fields include: Student: Andy Annual, ID: ANNUAL044, Provider: Bruce Speechdoe, Provider Type: Speech-Language Therapy, Date of Service: 02/07/2022, Start Time: 11:00 AM, End Time: 11:30 AM, Service Type: Speech-Language Therapy, and Service Duration: 30 minutes. A blue circle with the number '4' points to a 'lookup' button. Below the form, a red-bordered message states: "Click the Lookup link to select a mandate for this service record." The form also includes sections for Mandate Short Description (with checkboxes for Mandated Service, Add All Service Types, Add Expired/Outside Term Mandates, and Add Mandates Without/Pending IEP Consent), Session Type (Service Provided), Mandated Frequency, Claimed Frequency, Mandated Duration, Mandated Language of Service, Mandated Max. Group Size (Actual: Group of 4), Mandated Service Location (Actual: Separate Location - Therapy Room), CPT Code/Service Type Detail (with checkboxes for Treatment of speech, language, voice, communication, and/or auditory processing in a group setting - CPT code 92508, and Consultation: Phone/Tele-therapy - CPT code 12345), Progress Indicator (Student made expected progress toward goal attainment), and Notes for this Session (The student session notes are entered).

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 [SEIS InfoHub](#).

Mandate Short Description	Mandate Term	Service Type	Mandated Language of Service	Mandated Frequency	Mandated Duration	Mandated Max. Group Size	Mandated Service Location	Mandate Start Date
S:I:EP:SP:2W:30:4:EN:10M:3	10M	Speech-Language Therapy	English	2/week	30 Minutes	Group of 4	Separate Location Therapy Room	11/12/2021
S:I:EP:SP:1W:30:1:EN:10M:2	10M	Speech-Language Therapy	English	1/week	30 Minutes	Individual	Separate Location Therapy Room	11/12/2021

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.

Encounter Attendance

Student: Andy Annual ID: ANNUAL044 Provider: Bruce Speechdoe Provider Type: Speech-Language Therapy

Date of Service: 2/7/2022 Service Type: Speech-Language Therapy Start Time: End Time: Service Duration:

Mandate Short Description: S:I:EP:SP:2W:30:4:EN:10M:3

Add Mandates to the list (Check all that apply and click lookup to view Mandates list):

- Mandated Service (IEP/IESP/SP/CSP)  Compensatory Services
- Add All Service Types  Add Expired/Outside Term Mandates  Add Mandates Without/Pending IEP Consent

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.

<b>Mandate Short Description:*</b>	S:IEP:SP:2W:30:4:EN:10M:3 <span>lookup</span> <b>Add Mandates to the list (Check all that apply and click lookup to view Mandates list)</b> <input checked="" type="checkbox"/> Mandated Service (IEP/IESP/SP/CSP) <input type="checkbox"/> Compensatory Services <input type="checkbox"/> Add All Service Types <input type="checkbox"/> Add Expired/Outside Term Mandates <input type="checkbox"/> Add Mandates Without/Pending IEP Consent
<b>Session Type:</b>	Service Provided <span>▼</span>
<b>Mandated Frequency:*</b>	2 per week
<b>Claimed Frequency:*</b>	2 <span>▼</span> per week <span>8</span>

**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**.

<b>Mandated Max. Group Size:</b>	Group of 4 <span>9</span> <b>Actual:</b> (Select) <span>▼</span>
<b>Mandated Service Location:</b>	Separate Location Therapy Room <b>Actual:</b> (Select) <span>▼</span>
<b>CPT Code/Service Type Detail:</b>	<input type="checkbox"/> Treatment of speech, language, voice, communication, and/or auditory processing in a group setting - CPT code 92508 <input type="checkbox"/> Consultation: Phone/Tele-therapy - CPT code 12345
<b>Progress Indicator:</b>	(Select) <span>▼</span>

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.

The screenshot shows a certification form with three callouts:

- 10:** A red box highlights the "Notes for this Session:" text and a circular icon containing the number "10".
- 11:** A red box highlights a checkbox next to the text: "\*I certify that I was approved by the NYC DOE to that I provided the services as documented in this record, and to the truth of the information it contains."
- 12:** A red box highlights the "Save" button, with a "Cancel" button next to it.

Below the callouts, there is a certification statement: "By clicking the certification below, it is my intent to elhis record to the NYC DOE. My submission of this record in this fashion is the legal equivalent of my handwritten signature on the subm".

**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.

The screenshot shows a calendar for February 2022. The calendar is displayed in a grid format with columns for Sun, Mon, and Tue. The dates are 30, 31, 1 Feb, 6, 7, and 8. A purple event titled "SP 30m: Annual, Andy" is scheduled for February 7. The date February 1 is marked as "Lunar New Year".

Sun	Mon	Tue
30	31	1 Feb Lunar New Year
6	7 SP 30m: Annual, Andy	8

**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 [SE SIS 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**.

Service Calendar > Service Record

**Edit** Delete Print

**2** Encounter Attendance Warning: Make a copy of Session Notes before editing.

<b>Student:</b>	Andy Annual
<b>Student ID:</b>	ANNUAL044
<b>Provider:</b>	Bruce Speechdoe
<b>Date of Service and Start Time:</b>	03/07/2022, 11:00 AM
<b>End Time:</b>	11:30 AM
<b>Service Type:</b>	Speech-Language Therapy
<b>Language of Service:</b>	English
<b>Session Type:</b>	(Select)
<b>Duration:</b>	30 minutes
<b>Grouping:</b>	Group of 4
<b>Service Location:</b>	Therapy Room

**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.

Schedule Future Services:

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

Student: Andy Annual	ID: ANNUAL044	Provider: Bruce Speechdoe	Provider Type: Speech-Language Therapy
Date of Service: 3/7/2022	Start Time: 11:00 AM	End Time: 11:30 AM	Service Duration: 30 minutes
Service Type: Speech-Language Therapy	Temporary Service: <input type="checkbox"/>		

**3** → [lookup](#)

Add Mandates to the list (Check all that apply and click lookup to view Mandates list):

Mandate Short Description: \*

Mandated Service (IEP/IESP/SP/CSP)  Compensatory Services

Add All Service Types  Add Expired/Outside Term Mandates  Add Mandates Without/Pending IEP Consent

Click the Lookup link to select a mandate for this service record.

Session Type: (Select) ▼

Mandated Frequency: \*

Claimed Frequency: (Select) ▼

Mandated Duration: \*

Mandated Language of Service:

Mandated Max. Group Size: Actual: Group of 4 ▼

Mandated Service Location: Actual: Separate Location - Therapy Room ▼

Additional weeks to repeat schedule: N/A ▼

[Save](#) [Cancel](#)

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 [SE SIS InfoHub](#).

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

**4** →

- Verify/Edit the **Date of Service** and **Service Type**.
- Enter the **Start Time** and **End Time**, as appropriate.

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

The screenshot shows the 'Encounter Attendance' form. At the top, it displays 'Student: Andy Annual', 'ID: ANNUAL044', 'Provider: Bruce Speechdoe', and 'Provider Type: Speech-Language Therapy'. Below this, there are two red boxes. The first red box, labeled with a blue circle '6', contains the 'Date of Service' field (3/7/2022) and the 'Service Type' dropdown menu (Speech-Language Therapy). The second red box, labeled with a blue circle '5', contains the 'Start Time' and 'End Time' fields. Below these fields is the 'Mandate Short Description' field, which contains the text 'S:IEP:SP:2W:30:4:EN:10M:3'. Underneath this field is a section titled 'Add Mandates to the list (Check all that apply and click lookup to view Mandates list):' with several checkboxes: 'Mandated Service (IEP/IEP/SP/CSP)' (checked), 'Compensatory Services', 'Add All Service Types', 'Add Expired/Outside Term Mandates', and 'Add Mandates Without/Pending IEP Consent'.

**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.

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

The screenshot shows the 'Encounter Attendance' form with several fields highlighted. A red box labeled with a blue circle '6' highlights the 'Session Type' dropdown menu, which is currently set to '(Select)'. Below this, the 'Mandated Frequency' is set to '2 per week', the 'Claimed Frequency' is set to '2 per week', and the 'Mandated Duration' is set to '30 Minutes'. The 'Mandated Language of Service' is set to 'English'. The 'Mandated Max. Group Size' is set to 'Group of 4', and the 'Actual' dropdown menu is highlighted with a red box and a blue arrow. The 'Mandated Service Location' is set to 'Separate Location Therapy Room', and the 'Actual' dropdown menu is also highlighted with a red box and a blue arrow. At the bottom left, there is a blue circle labeled '7' with an arrow pointing to the 'Save' button. A 'Cancel' button is also visible next to the 'Save' button.

**Note:** After the service record is saved, the incomplete service record will display on the *Service*

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*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.