



Completing a Service Record for Counseling Services

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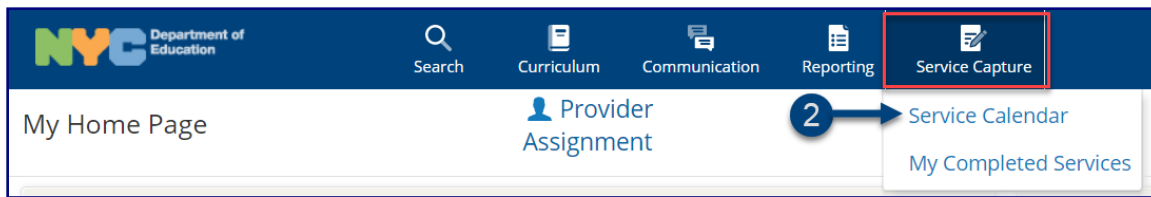
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Introduction

This training guide provides instruction for Guidance Counselors, School Psychologists, and Social Workers to complete a past service record for a student with mandated counseling on their *Individualized Education Program (IEP)*, *Individualized Educational Service Plan (IESP)*, *Services Plan (SP)* or *Comparable Service Plan (CSP)* in Encounter Attendance.

Encounter Attendance

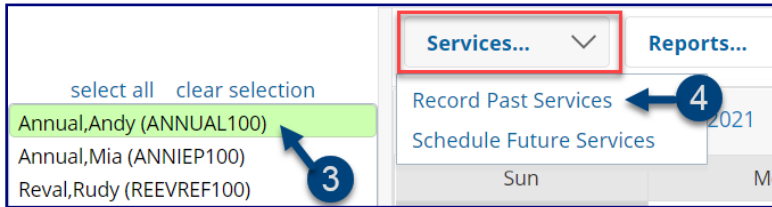
1. **Log in** to SESIS.
2. From the *Top Navigation bar* on your homepage, click **Service Capture**, then select **Service Calendar**.



Select Student and Verify/Select Mandate

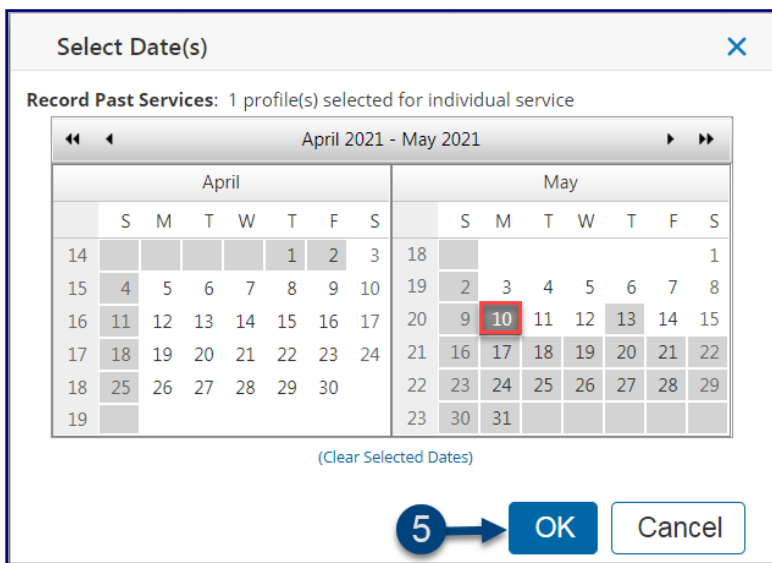
- On the left side of the screen, click to highlight the **student** from your caseload for whom you want to record a past service.
- Click the **Services** dropdown menu and select **Record Past Services**.

Note: You may also right click on a specific day and select **Record Past Services**.



Note: The Record Past Services pop-up calendar displays on top of the Service Calendar. Since you are recording a past service, future calendar days are grayed out.

- Select the **date(s)** of service to be recorded on the Record Past Services pop-up calendar and click **OK**.



Note: If the student has multiple mandates for the same Service Type, the Select Mandate pop-up window will display, and you need to select the appropriate mandate.

Mandate Short Description	Mandate Service Term	Mandate Service Type	Mandated Language of Service	Mandated Frequency	Mandated Duration	Mandated Max. Group Size	Mandated Service Location	Mandate Start Date	Mandate End Date
S:I:EP:CO:1W:30:1:EN:10M:1	10M	Counseling Services	English	1/week	30 Minutes	Individual	Separate Location Therapy Room	06/14/2021	
S:I:EP:CO:2W:30:4:EN:10M:2	10M	Counseling Services	English	2/week	30 Minutes	Group of 4	Separate Location Therapy Room	06/14/2021	

- Verify/Enter the actual **Start Time**, and **End Time** for the session.
- The *Service Type* will be pre-populated. If it is not correct, select the correct service type from the dropdown menu.

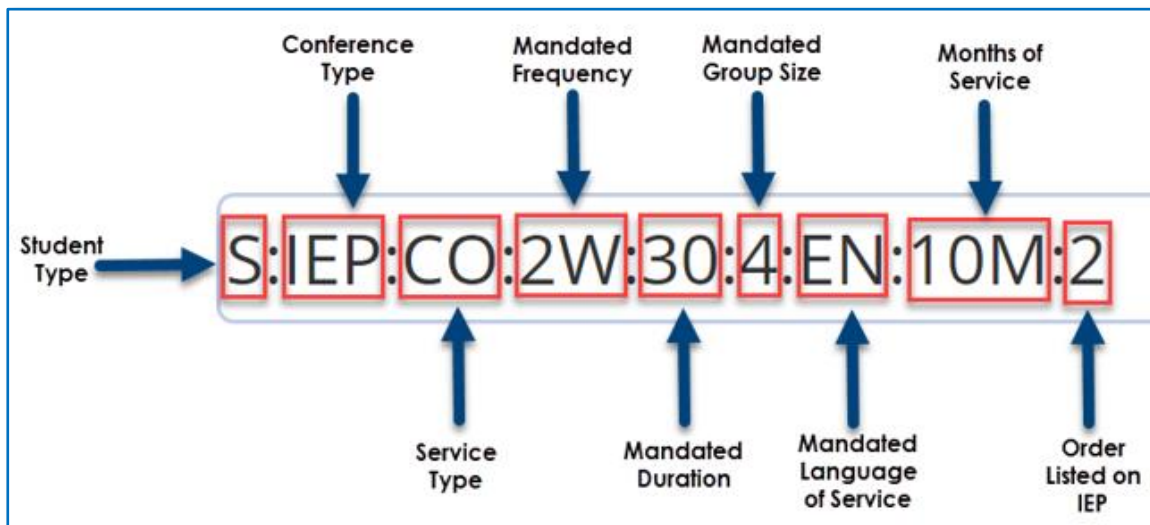
Encounter Attendance							
Student:	Andy Annual	ID:	ANNUAL098	Provider:	Eunice Sworker	Provider Type:	Counseling Services
Date of Service:*	01/10/2022	Start Time:*		End Time:*		Service Duration:	
Service Type:*	Counseling Services						

Note: A warning message will display if you select a *Service Type* for a role you are not assigned. However, the message will not prevent you from recording the service.

Mandate Short Description:*	<p>lookup</p> <p>Add Mandates to the list (Check all that apply and click lookup to view Mandates list):</p> <p><input checked="" type="checkbox"/> Mandated Service (IEP/IESP/SP/CSP) <input type="checkbox"/> Compensatory Services</p> <p><input type="checkbox"/> Add All Service Types <input type="checkbox"/> Add Expired/Outside Term Mandates <input type="checkbox"/> Add Mandates Without/Pending IEP Consent</p> <p>Please click the Lookup link to select a mandate for this service record.</p> <p>The selected service type doesn't match your SESIS role.</p> <p>Please do not change mandated duration or mandated frequency unless you are correcting an error.</p>
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Mandate Short Description

The *Mandate Short Description* is broken down as follows:



Note: For more information, please refer to *Understanding the Mandate Short Description* [guide](#) on the [SEIS InfoHub](#).

8. Verify/Select the **Mandate Short Description**.

Note: If the mandate you served is not displayed in the *Mandate Short Description*, use the *lookup* link to search for additional mandates, including those not current or expired at the time of service.

Mandate Short Description:*	S:IEP:CO:2W:30:4:EN:10M:2 lookup
	Add Mandates to the list (Check all that apply and click lookup to view Mandates list): <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

Note: The *Compensatory Services* checkbox is used to encounter services from the *Compensatory Services* section of the IEP, services provided during *Sensory Exploration, Education & Discovery (SEED)* programming, or services that are not associated with an IEP, IESP, SP or CSP recommendation. It is also selected for services provided pursuant to an impartial hearing order, resolution, or settlement, and *Alternate Placement Paraprofessional* services.

Mandate Short Description:*	S:IEP:SP:3W:30:1:EN:10M:3 lookup
	Add Mandates to the list (Check all that apply and click lookup to view Mandates list): <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

For more information regarding how to determine the need for *Compensatory Services* at IEP Meetings, how to record services for *Alternate Placement Paraprofessional*, go to the [Determining the Need for Compensatory Services at IEP Meetings](#) or [Completing a Service Record for Paraprofessionals](#) guides on the InfoHub.

9. Verify/Select the **Session Type**.

Session Type:	Service Provided lookup
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Note: "Mandated" fields (e.g., *Mandated Frequency*, *Mandated Duration*) auto-populate from the conference document.

Claimed Frequency



10. Verify/Select the **Claimed Frequency**.

Mandated Frequency:*	2 per week
Claimed Frequency:*	2 lookup per week
Mandated Duration:*	30 Minutes
Mandated Language of Service:	English

Note: The *Claimed Frequency* is the portion of the mandate for which you will be providing service to the student. It doesn't need to be changed if you're providing the full service. Claiming does not impact the ability of other providers to enter encounters for the same mandate which is shared by more than one provider.

11. Select/Verify the **Actual Group Size**.

12. Select/Verify the **Actual Service Location**.

Mandated Duration:*	30 Minutes	
Mandated Language of Service:	English	
Mandated Max. Group Size:	Group of 4	Actual: (Select) 
Mandated Service Location:	Separate Location Therapy Room	Actual: (Select) 

CPT Codes, Progress Indicator and Session Notes

13. Select **CPT Codes/Service Type Detail** (optional at this time).




Note: Current Procedural Terminology (CPT) Codes are optional for Counseling Services and will display based on the grouping value. You may check more than one CPT code, if applicable, depending on the duration/grouping of the session.


14. Select the student's progress from the **Progress Indicator** dropdown menu.

15. Enter your session notes for the student in the **Notes for this Session** text box.

Note: Counseling session notes may be entered as "confidential" if judged to be sensitive by the provider.

Notes from the student's last recorded session will appear in the *Notes from Last Session* text box, regardless of who worked with the student. For example, if you are splitting the mandate with another provider who most recently provided services, you will be able to see their notes from the last session.

CPT Code/Service Type Detail:	<input type="checkbox"/> Group psychotherapy (other than of a multiple-family group) - CPT code 90853 <input type="checkbox"/> Consultation: Phone/Tele-therapy - CPT code 12345	
Progress Indicator:	(Select) 	
Notes for this Session:	Notes from Last Session:	<div style="border: 1px solid red; padding: 2px;"> AN 10 2022: 11:00 AM - 11:30 AM by SOCWRK Confidential </div>



Certify and Save Service Record

16. **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.

17. Click **Save** to save your entries and finalize the *Service Record*.

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.

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.

Save Cancel

18. After the service capture has been certified and saved, the completed service record will display on the *Service Calendar* in purple. **Double click**, or **right click** on the record to view the details.

today		Jan, 2022			
Sun	Mon	Tue	Wed	Thu	
26	27	28	29	30	
	Winter Recess	Winter Recess	Winter Recess	Winter Recess	
2	3	4	5	6	
9	10	11	12	13	
	CS 30m: Annual, Andy		CS 30m: Annual, Andy		