



Completing a Service Record for Occupational Therapy Providers

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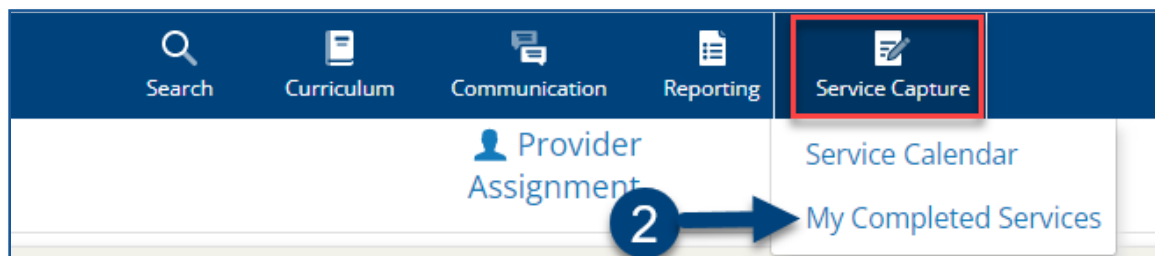
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Introduction

This training guide provides instruction for Occupational Therapists to complete a past Encounter Attendance Service Record for a student.

Encounter Attendance

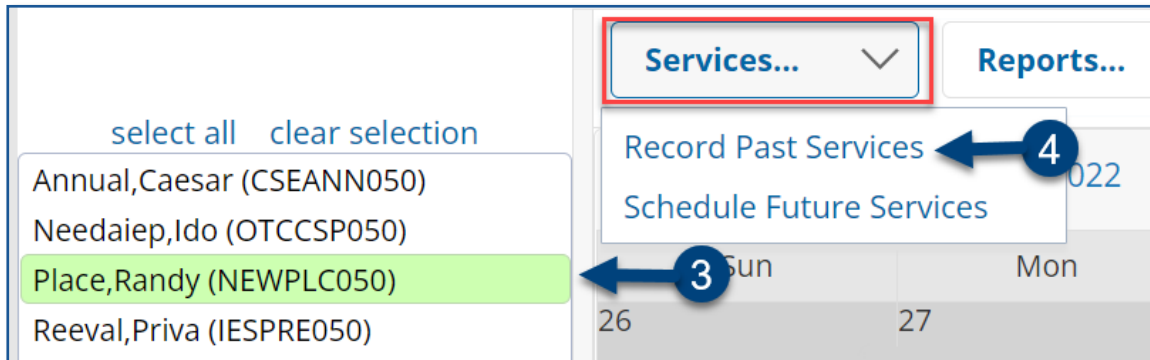
1. **Log in** to SESIS.
2. From the *Top Navigation bar* on your homepage, click **Service Capture**, then select **Service Calendar**.



Select Student and Verify/Select Mandate

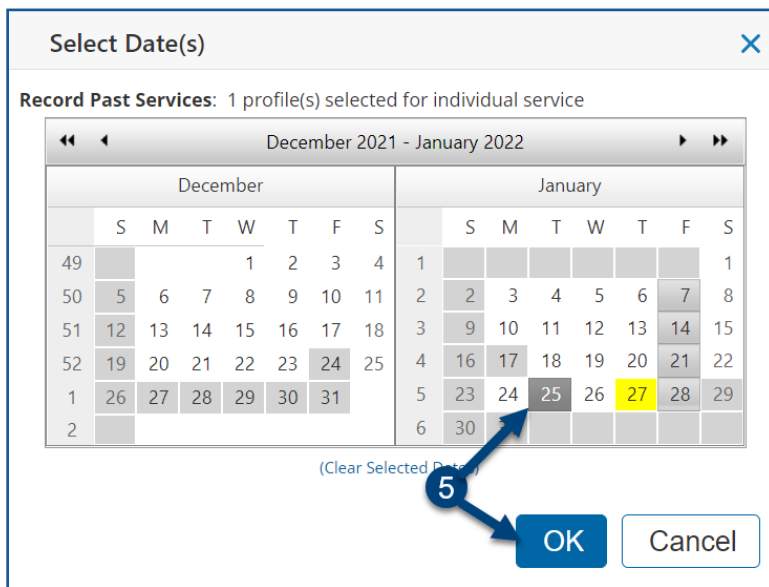
3. Select the student (click to highlight) from your caseload on the left side of the screen for whom you want to record a past service.
4. Click the **Services** dropdown menu and select **Schedule Future Services**.

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



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

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.



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 Term	Service Type	Mandated Language of Service	Mandated Frequency	Mandated Duration	Mandated Max. Group Size	Mandated Service Location	Mandate Start Date	Mandate End Date
S:IEP:OT:1W:30:1:EN:10M:2	10M	Occupational Therapy	English	1/week	30 Minutes	Individual	Separate Location: Therapy room	07/01/2021	
S:IEP:OT:1W:30:8:EN:10M:3	10M	Occupational Therapy	English	1/week	30 Minutes	Group of 8	General Education Classroom	07/01/2021	

- 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: Randy Place	ID: NEWPLC050	Provider: Samantha Otdoe	Provider Type: Occupational Therapy
Date of Service: 01/25/2022	Start Time: 9:00 AM	End Time: 9:30 AM	Service Duration: 30 minutes
Service Type: Occupational Therapy			

Arrows point to the Start Time field (6) and the Service Type dropdown (7).

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.

Encounter Attendance

Student: Randy Place	ID: NEWPLC050	Provider: Samant
Date of Service: 01/12/2022	Start Time: 9:00 AM	End Time: 9:30 AM
Service Type: Physical Therapy		

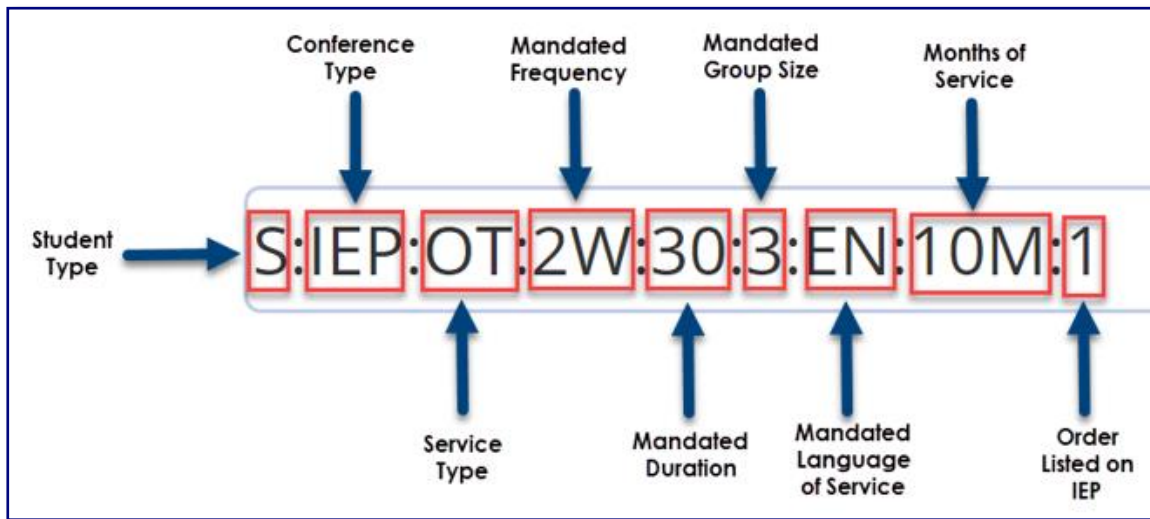
Mandate Short Description: Add Mandates to the list (Check all that apply and click lookup to view Mandates list):

- Mandated Service (IEP/IESP/SP/CSP) Compensatory Services
- Add All Service Types Add Expired/Outside Term Mandates Add Mandates W

The selected service type doesn't match your SESIS role.

Mandate Short Description

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



Note: For more information, please refer to the *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* field, check the *Add All Service Types*, *Add Expired/Outside Term Mandates*, and/or *Add Mandates Without/Pending IEP Consent* boxes and click the **lookup** link to display additional mandates.

Mandate Short Description: S:IEP:OT:2W:30:3:EN:10M:1 **lookup**

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

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**

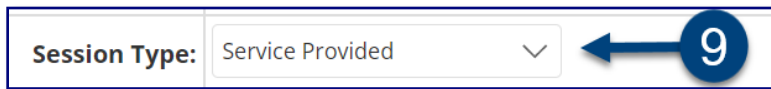
Add Mandates to the list (Check all that apply and click lookup to view Mandates list):

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

Add All Service Types Add Expired/Outside Term Mandates 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**.



A screenshot of a form field labeled "Session Type:" with a dropdown menu showing "Service Provided". A blue circle with the number "9" and an arrow points to the dropdown arrow.

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

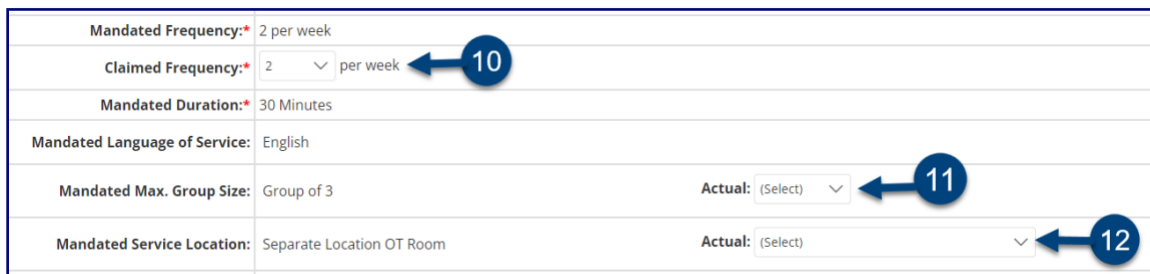
Claimed Frequency

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

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**.



A screenshot of a form with several rows. The first row is "Mandated Frequency:*" with "2 per week". The second row is "Claimed Frequency:*" with "2" in a dropdown and "per week", with a blue circle "10" and arrow pointing to the dropdown. The third row is "Mandated Duration:*" with "30 Minutes". The fourth row is "Mandated Language of Service:" with "English". The fifth row is "Mandated Max. Group Size:" with "Group of 3" and "Actual: (Select)" dropdown, with a blue circle "11" and arrow pointing to the dropdown. The sixth row is "Mandated Service Location:" with "Separate Location OT Room" and "Actual: (Select)" dropdown, with a blue circle "12" and arrow pointing to the dropdown.

CPT Codes and Session Notes

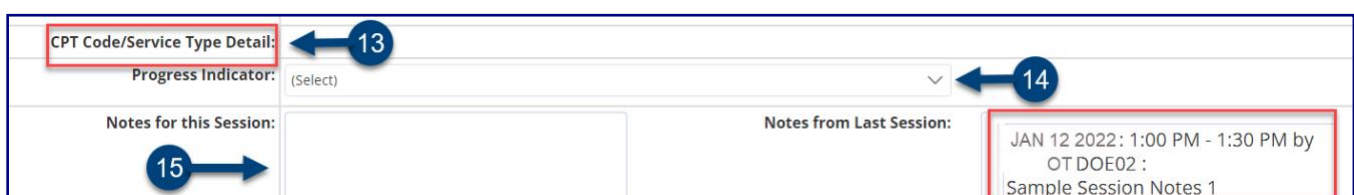
13. Select **CPT Codes/Service Type Detail**.

Note: *Current Procedural Terminology* (CPT) codes 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.

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.

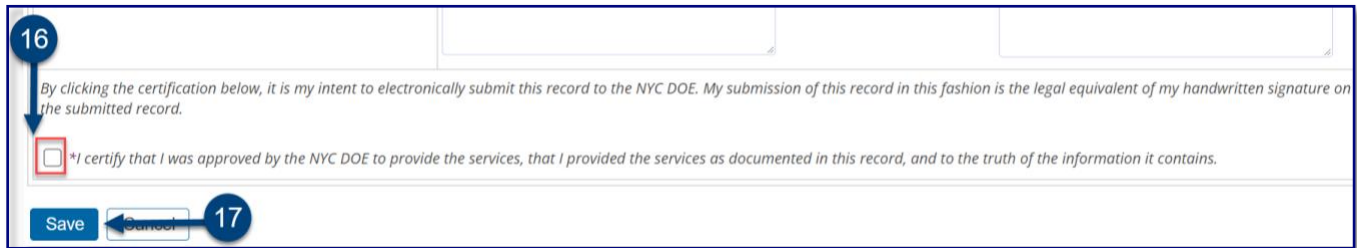


A screenshot of a form section. The first row is "CPT Code/Service Type Detail:" with a red box around it and a blue circle "13" and arrow pointing to it. The second row is "Progress Indicator:" with "(Select)" and a dropdown arrow, with a blue circle "14" and arrow pointing to the dropdown. The third row is "Notes for this Session:" with a blue circle "15" and arrow pointing to the text box. The fourth row is "Notes from Last Session:" with a red box around it containing the text "JAN 12 2022: 1:00 PM - 1:30 PM by OT DOE02 : Sample Session Notes 1".

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 finalize the Service Record.



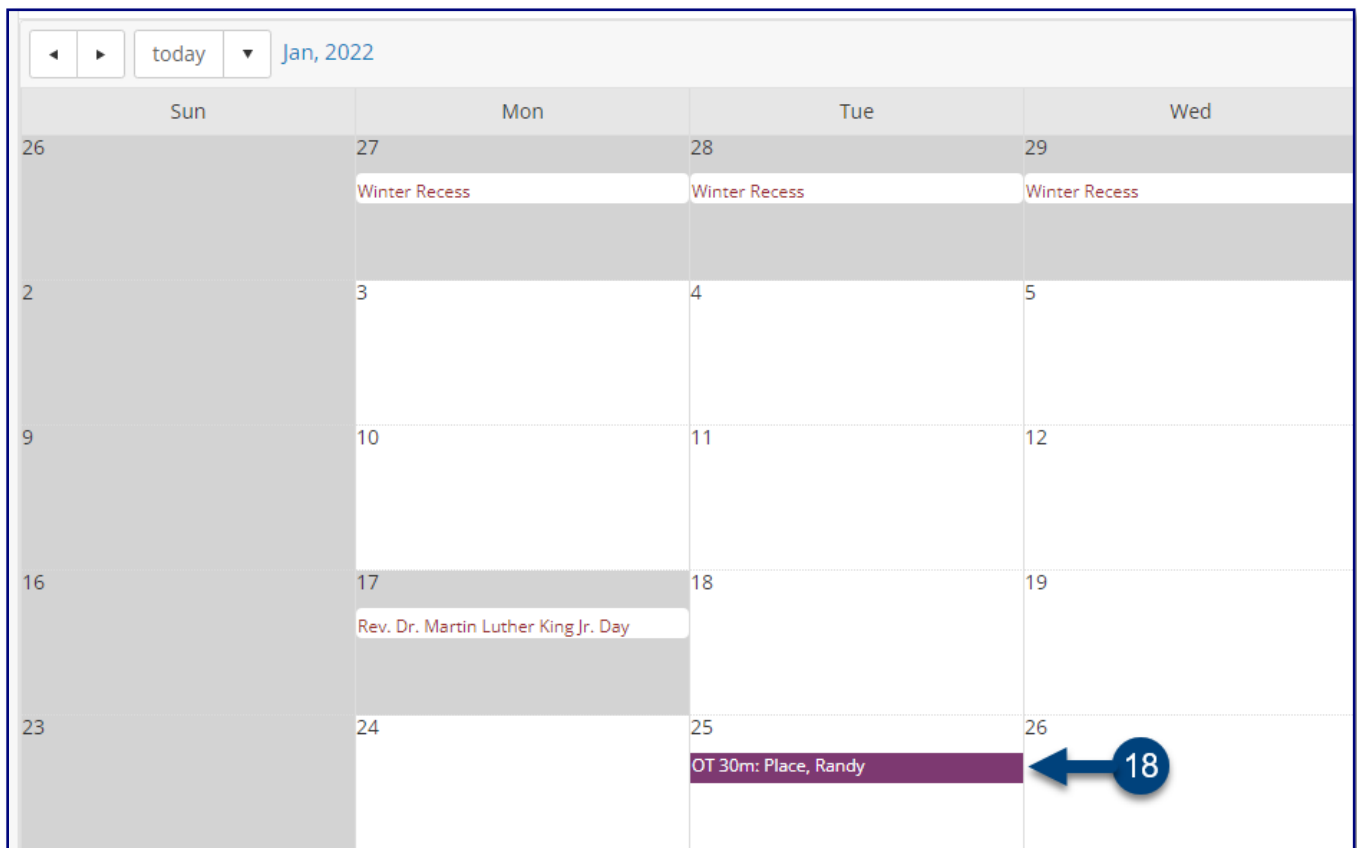
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By clicking the certification below, it is my intent to electronically submit this record to the NYC DOE. My submission of this record in this fashion is the legal equivalent of my handwritten signature on the submitted record.

*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.

Save ← Cancel 17

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
26	27 Winter Recess	28 Winter Recess	29 Winter Recess
2	3	4	5
9	10	11	12
16	17 Rev. Dr. Martin Luther King Jr. Day	18	19
23	24	25 OT 30m: Place, Randy	26

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