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1 Service Documentation

1.1 User Setup

For Clinicians to use the Logging Wizards, information must be entered in the Service Certifications table in the user personal page. From the Main Menu select “Admin” and then select “Users.” Search for the user by User Type and/or name and click the “View Users” button at the bottom of the page. From the search results, click on the user’s name and scroll down to the bottom of the user personal page to the “Service Certifications” section.

Service Certifications					
Special Ed Services					
Related Services					
Services:	Can Provide	Does Not Require Approval/Can Be Supervisor	Supervisor	Certified	Certifications
Audiology (Hearing Services)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			VIEW
Behavior (Modification) - Applied Behavior Analysis	<input type="checkbox"/>				VIEW
Counseling Group	<input type="checkbox"/>				VIEW
Counseling Individual	<input checked="" type="checkbox"/>	<input type="checkbox"/>	MANAGE SUPERVISORS		VIEW
Daily Living Skills (Personal Care Assistance)	<input type="checkbox"/>				VIEW

Figure 1: Service Certification Details

This table lists the therapy disciplines and “Can Provide” checkboxes indicating whether the user is permitted to provide (log) these types of services. Select the appropriate checkbox(es) for the therapist.

If the therapist can approve his or her own service logs (no supervisory signature needed), the “Does Not Require Approval/Can Be Supervisor” box should be checked. If the therapist is not allowed to approve his or her own service logs, the checkbox “Can Approve Own Service Logs” should remain unchecked.

The Service Certifications table also allows users to manage clinician supervisors for use of the Supervision Signoff Feature, if “Does Not Require Approval/Can Be Supervisor” is not checked. The “Manage Supervisors” function allows the selection of an overall supervisor or school level supervisor. The overall supervisor oversees the whole caseload for a supervisee regardless of the school they attend, while the school level supervisor approves services delivered at a specific school.

Click the “Manage Supervisors” button to assign supervisors to clinicians. Click the relevant supervisor type dropdown and select the name of the supervisor to assign. Click the “Update the Database” button when finished.

Current School	Supervisor
Kathleen E. Goodwin Elementary School	-No Supervisors Available-
Plainfield High School	Jane Thompson
Qa Test School1	
Qa Test School3	
Qa Test School5	

UPDATE THE DATABASE

Figure 2: Manage Supervisors

1.2 Service Documentation Wizard Setup

To log services for students, select the appropriate logging wizard from the “Wizards” tab.

Figure 3: Selecting the Appropriate Wizard

On the next screen the user will see a listing of the students on their caseload with services available for logging. Select the student to document for by clicking the check mark next to the student’s name. The check mark will turn green when the student is selected. The “I” (idents) can be used to view applicable service information for the student.

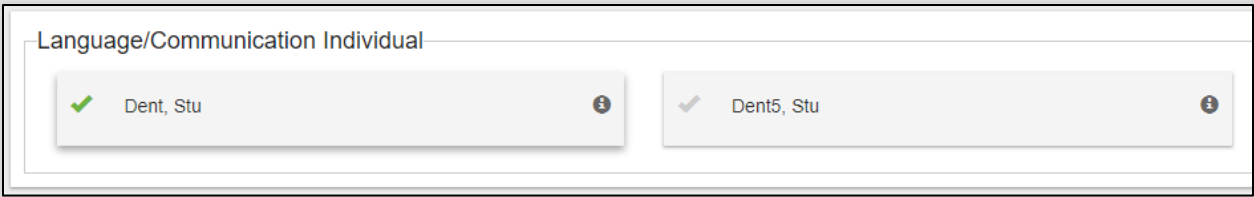


Figure 4: Caseload View

The user can filter their caseload to help identify students to document for (i.e. by school).

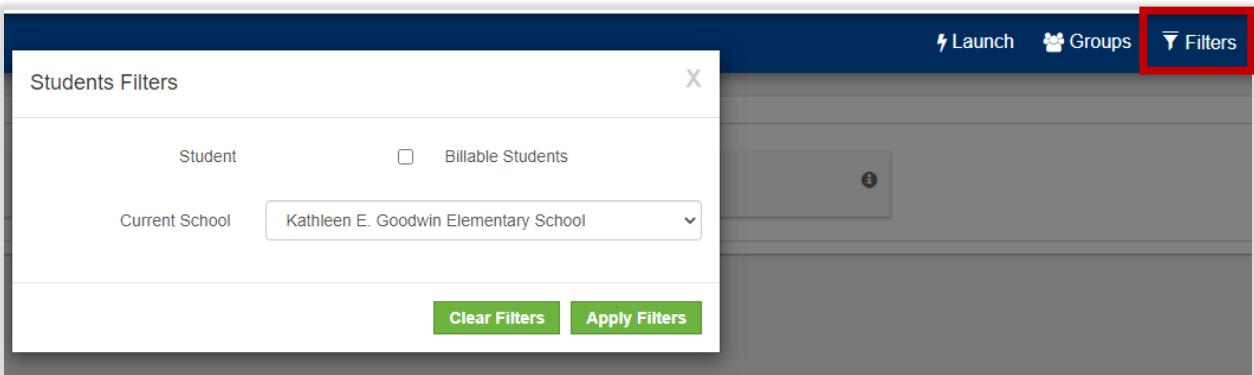


Figure 5: Caseload Filters

Groups can be created within the Logging Wizards for easy selection of the same students. To set up a group, select more than one student after the user applied any sorts or filtering. The user will see another button appear next to the Filter button called “Groups”. Click the button, then click “Create Group from Selected students”. Name the group, then click Save to save the group of students. Groups can also be overwritten with new students, or deleted by clicking the Groups button. Once the user has pre-built groups, the user can easily use the “Groups” button to easily select that group of students again and log services for that group together.

Once the user has selected the student(s) to document for, click the “Launch Wizard” button located at the bottom of the screen.

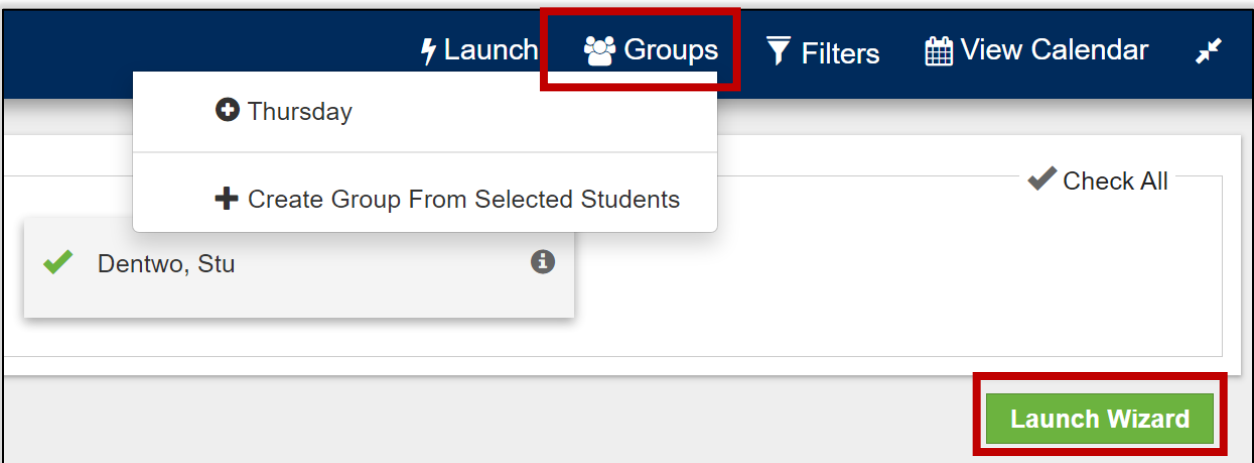


Figure 6: Caseload Groups

1.3 Service Documentation Logging Wizard

Service/Plan info about the students selected for documentation can be located next to their name on the left hand of the screen in the green navigation bar.

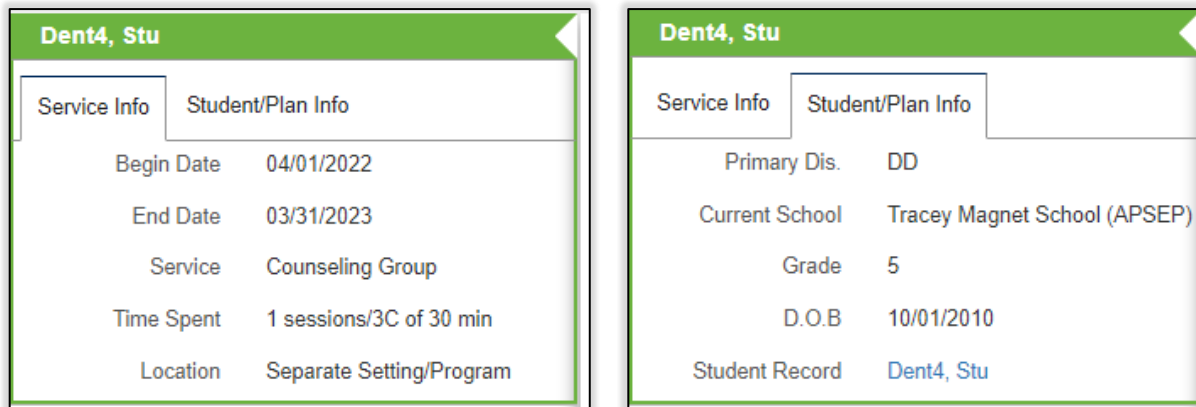


Figure 7: Student Service/Plan Information available in Wizard

Any previously logged sessions on this student by the user or another clinician will appear above the logging wizard in the Previous Log Entries section. Additionally, the user can filter for specific sessions and expand a session using the plus button to see additional information in this section.

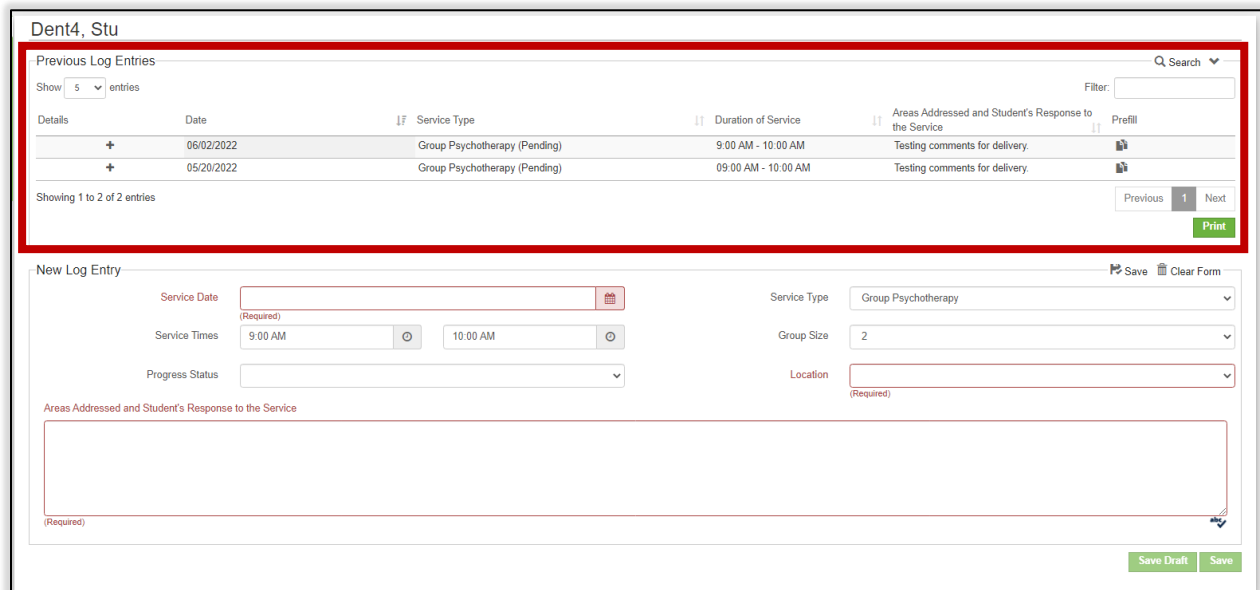


Figure 8: Previously Logged Entries in Wizard

Enter required information into the logging wizard. Date, service type, duration of service and location are required fields. Additional fields will appear in red with a required notation depending on the service type selected.

Figure 9: New Log Entries in Wizard

Enter service note information into the “Areas Addressed and Student’s Responses to Service” section of the logging wizard. Spell check is available for the user to use under the comments text box.

Figure 10: Areas Addressed and Student’s Responses to Service in Wizard

Once the user is done entering service information for a student, click the “Save” button below the “Areas Addressed and Student’s Responses to Service” box, or the user can continue to log for additional students on this screen if the user selected more than one student to document on. Once the user is done logging all services, click the “Save All” button at the bottom of the screen.

A confirmation message will display asking the user to confirm the information entered. The user has the option to delete the note, edit the note, confirm the note and return to the top of the logging wizard, confirm the log and enter more logs for the student the user is working on, or confirm the logs and return to the student selection page.

Confirm Log Entry

Dent, Stu

Log ID	13	Provider	Gwendolin Bryant
Service Date	06/09/2022	Service Type	Student Not Present
Duration of Service	00 mins	Group Size	1 (Individual)
Location	Other		

Areas Addressed and Student's Response to the Service

Test

Delete
Edit

Confirm log(s), then return to the top of the logging wizard

Confirm log(s), then enter more logs for this Student

Confirm log(s), then return to the Student selection page

Figure 11: Edit, Confirm or Log Additional Services Screen in Wizard

1.4 Service Documentation: Group Logging in Wizard

To document services using the Group Logging Wizard, click on the “Group Logging” button located at the top of the logging wizard.



Figure 12: Group Logging in Wizard

A different pop up window will guide the user through a documentation screen where the user will enter service information that pertains to all students in the group session. Areas covered/assessed selections on this screen should be applicable to the entire group. When the user is finished, click the “Apply” button. The information the user entered pertaining to all students will be prepopulated in the logging wizard for the students selected. This information can be edited or changed at any time.

Select Group Fields
X

Service Date

Service Type

Duration of Service

Group Size

Location

Areas Covered/Assessed

<input type="checkbox"/> Manipulative activities	<input type="checkbox"/> Negative practice	<input type="checkbox"/> Modeled drill/unmodeled drill
<input type="checkbox"/> Worksheet activities	<input type="checkbox"/> Language poster boards and pictures	<input type="checkbox"/> Augmentative device practice/use
<input type="checkbox"/> Language kits/programs	<input type="checkbox"/> Teacher made materials	<input type="checkbox"/> Classroom observation/consultation
<input type="checkbox"/> Carryover activities	<input type="checkbox"/> Listening tasks/discussion	

Cancel

Apply

Figure 13: Group Logging Set up in Wizard

Next, enter individual information for each student in the group session, including service notes in the “Areas Addressed and Student’s Responses to Service” box. When the user is done, click the “Save All” button located either at the very bottom of the screen, or in the blue menu bar.